Chapter 1 – System Diagnostics

Chapter Overview

This Idaho Air Passenger Demand Study has, at its core, several discrete data gathering efforts. Two survey efforts were conducted within the State, including a mail survey directed to the Idaho's travel agencies and a passenger intercept survey completed at each of Idaho's airports. Additionally, parking lot counts were tallied at each airport. Finally, Wilbur Smith Associates assembled an extensive compilation of socioeconomic data for each county in the State. The results of each of these efforts are presented in this chapter, with attention paid to airport- or market-specific issues where applicable.

Survey and Data Acquisition Efforts
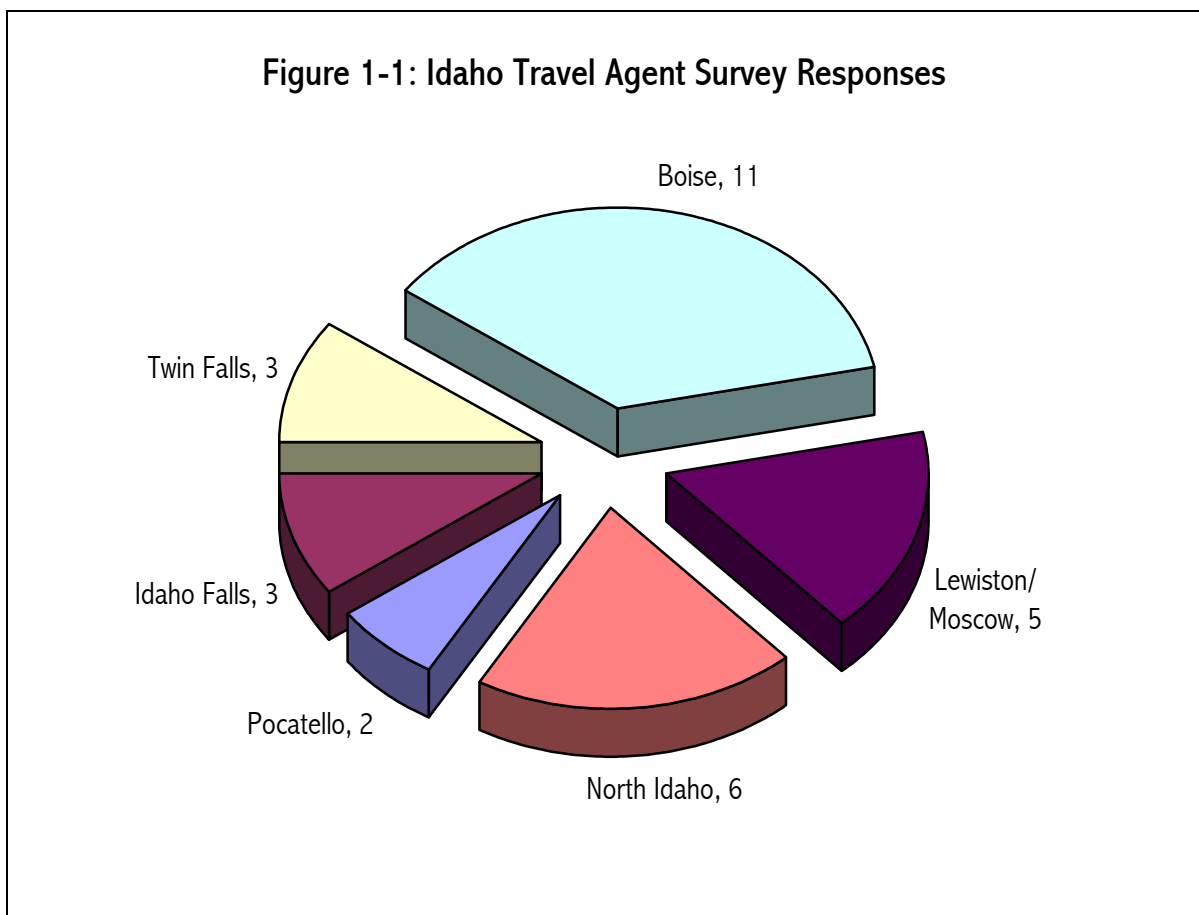
Travel Agent Survey

Survey Method. A six-question survey was created by Wilbur Smith Associates for distribution to all of the travel agents in the State of Idaho. Doherty & Associates of Boise obtained a listing of all Idaho travel agencies. Along with the survey, a cover letter explaining the purpose of the survey and describing usage of the results were sent to each travel agent. One hundred and eight (108) surveys and cover letters were distributed via the U.S. Postal Service on October 9, 2002 with return pre-paid postage. The survey asked respondents to return the survey by November 15, 2002.

Question 1 asked the travel agents to identify how many airline tickets they sold in 2001 or to list the agency's total dollar volume in 2001 along with corresponding average ticket value. Question 2 inquired which airport is closest to the agency and noted this should be referred to as the "local airport" for the remaining survey questions. The largest volume airports used by agency customers and the percentage of tickets sold from each of the identified airports was the first part of the Question 3. The second part of Question 3 requested reasons for utilization of the listed "large volume airports" as opposed to the local airport. Question 4 asked for the agency's customers' top five air travel destinations with the approximate number of corresponding tickets per year. Question 5 was intended to better understand customers' driving versus flying decisions; the question asked for an estimate of the minimum fare differential that would cause customers to drive to an alternate airport to begin the air portion of their trip. Additionally, Question 5 asked travel agents to estimate the maximum distance that customers are willing to drive to a non-local airport to begin the air portion of their travel. Question 6 solicited any other comments or suggested air service improvements.

Initially, Doherty & Associates received 15 responses to the survey. Out of those 15 responses, 5 did not list the name of the travel agency responding. Also, one of the 15 responses accounted for 11 branch offices throughout the State of Idaho. On November 6 and 7, Doherty & Associates staff called 88 travel agencies to ensure that the agencies had received the survey and to remind

them to complete the survey in a timely manner. Six travel agents gave information over the phone to complete the survey and 18 travel agencies on the list were deleted because they either were no longer in existence or did not actually sell airline tickets. Some of the travel agents said they could not locate the initial survey, so 15 surveys were mailed out again and 6 were sent via facsimile. After the phone calls, 9 additional surveys were received by November 22, 2002. Overall 30 responses (representing 40 agency offices) were received out of 90 travel agency offices located in the State.

Survey Results. The responses received from the travel agents in Idaho were split in to six distinct geographic areas for result analysis. **Figure 1-1** shows the response rate for each of these geographic regions.

Figure 1-1: Idaho Travel Agent Survey Responses

Specific data obtained from the travel agent surveys is summarized below. Charts showing the frequency of airport usage by the agencies' customers are presented for each airport.

Boise (**Figure 1-2**)
- 11 travel agents responded in close proximity to Boise
- Number of tickets sold by each agency ranges from 3,763 to 97,992
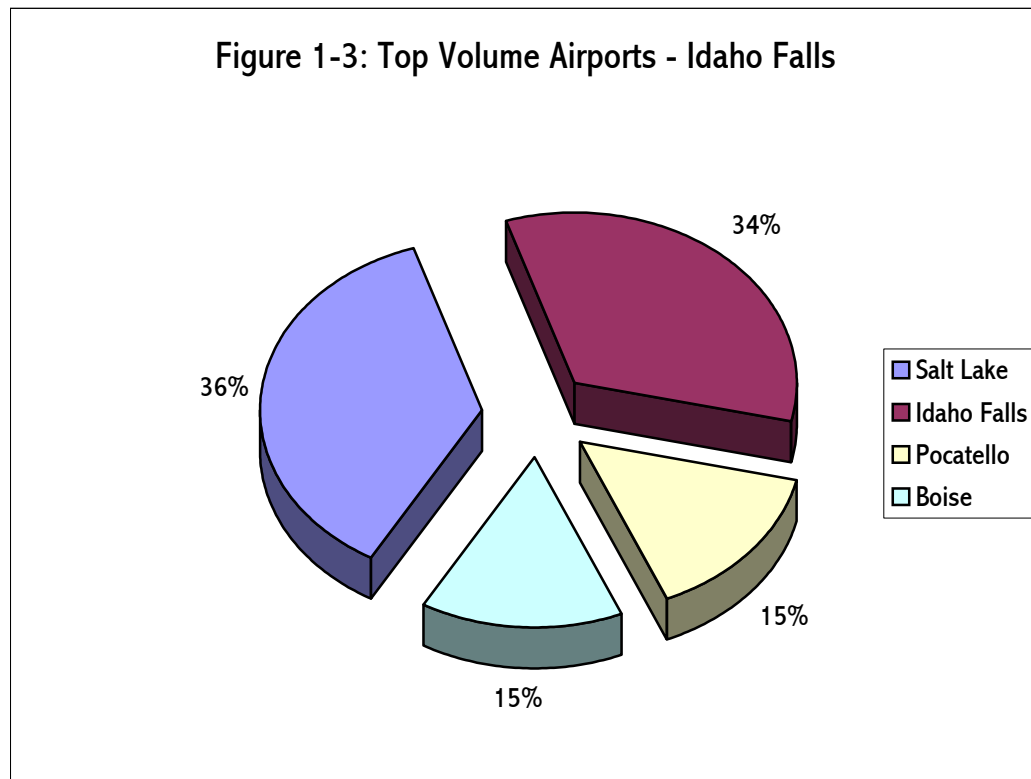- Annual volume of airline sales range from $1 million to $5 million

- Average ticket values range from $188 to $325
- Local airport is Boise Air Terminal
- Top volume airport is Boise Air Terminal, which is used over 80 percent of time because of the location
- Other airports that are used infrequently are those serving Spokane, Salt Lake City, Pocatello, Idaho Falls, and Twin Falls. Reasons they are used include the airports are the closest to the customer or they have better fares, schedules, or connections
- Top air travel destinations include Seattle, Salt Lake City, Portland, Spokane, Phoenix, Los Angeles, Las Vegas, and San Francisco
- Minimum difference in round trip fares that will cause the customers to drive to an alternate airport needs to be $150
- Maximum distance that customers are willing to drive to a non-local airport is 400 miles
- Comments are positive regarding the air service in Boise

Figure 1-2: Top Volume Airports - Boise
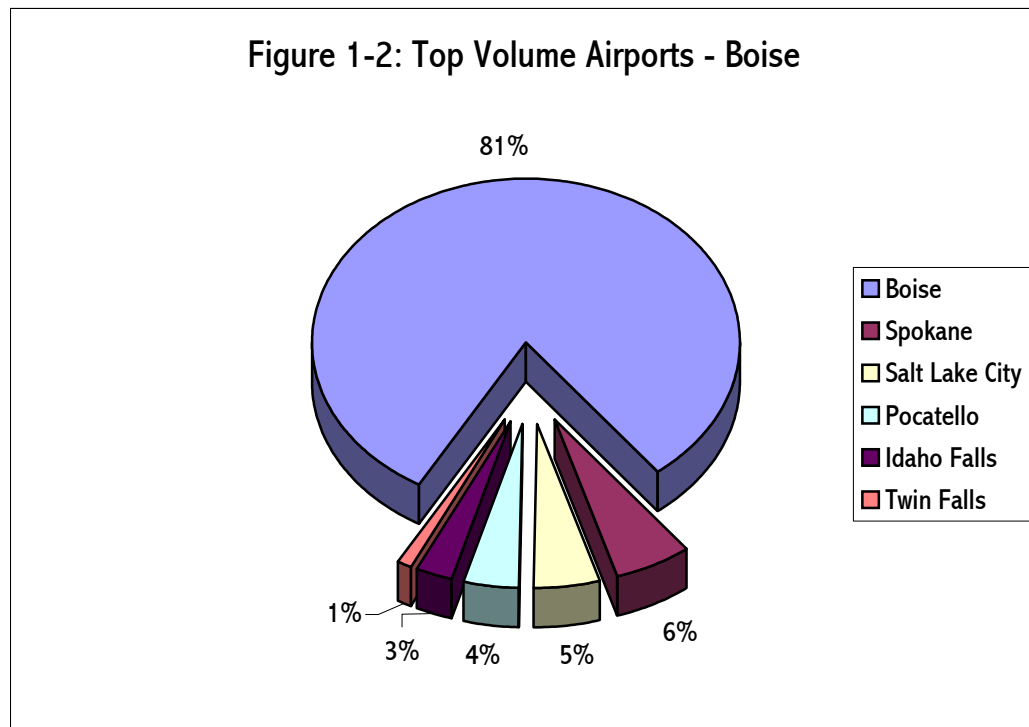
Idaho Falls (Figure 1-3)
- 3 travel agents responded from Idaho Falls area
- Average number of tickets sold is 48,000
- Average annual dollar volume of airline sales is $300,000
- Local airport is Idaho Falls Regional

- Top volume airport is Salt Lake City with variations in percentage used from 20 percent to 98 percent; this airport is chosen for its competitive fares and its extensive level of airline service
- The second highest volume airport listed is Idaho Falls Regional because of the local convenience. Pocatello Regional and Boise Air Terminal are used if the fares are more competitive or if Salt Lake City service (i.e. seats) is not available
- Top air travel destinations include Orlando, Las Vegas, Anaheim, New York, Mexico, Hawaii, and Europe
- Minimum difference in round trip fares that will cause the customers to drive to an alternate airport needs to be $100
- Maximum distance that customers are willing to drive to a non-local airport is 250 miles
- Comment is that "good air transportation access would be within and hour and a half from home with at least 30 passenger planes 5-6 times a day"

Figure 1-3: Top Volume Airports - Idaho Falls

Lewiston/Moscow (**Figure 1-4**)

- 5 travel agents responded in Lewiston/Moscow area
- Number of tickets sold ranges from 800 to 4,500
- Dollar volume of airline sales range from $1 million to $2 million
- Average ticket value is $285
- Local airports are Lewiston/Nez Perce County and Pullman-Moscow Regional

- Top volume airports are Lewiston/Nez Perce County used 34 percent of the time and Spokane which is used 32 percent of the time
- Lewiston/Nez Perce County is used because of the local convenience and Spokane for lower fares
- Seattle and Pullman-Moscow Regional are both used 17 percent of the time. Seattle is used because of lower fares and Pullman-Moscow Regional is used because of the local convenience
- Top air travel destinations include Boise and Seattle, followed by Portland, Las Vegas, and Phoenix
- Minimum difference in round trip fares that will cause the customers to drive to an alternate airport needs to be $70
- Maximum distance that customers are willing to drive to a non-local airport would be 150 miles
- Comments include "shorter connections," "multiple flights," and "more airlines [are needed] in the Northern Idaho area"

Figure 1-4: Top Volume Airports - Lewiston/Moscow
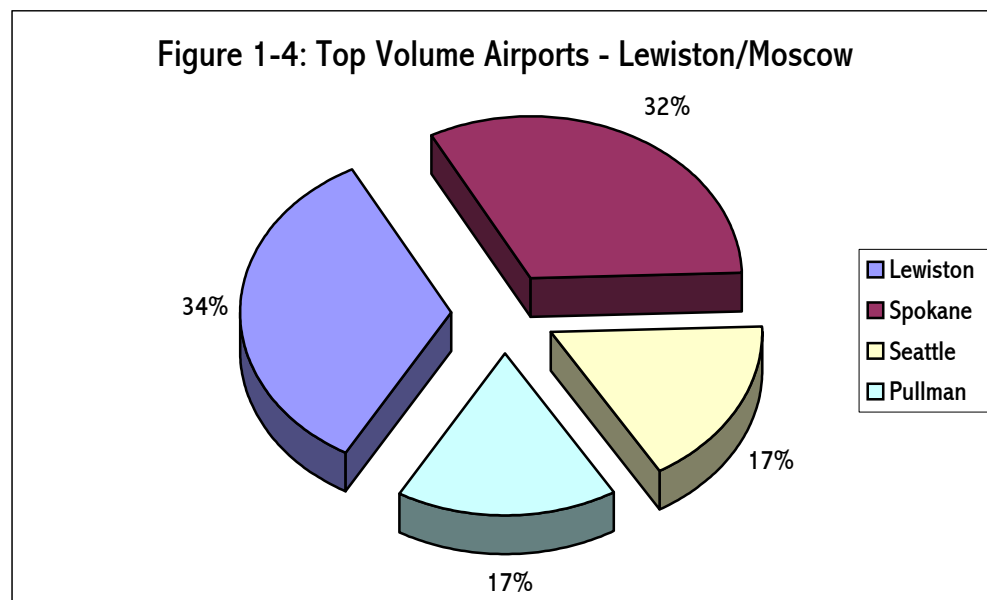
Pocatello (Figure 1-5)

- 2 travel agents responded in the Pocatello area
- Average annual dollar volume of airline sales is $1.5 million
- Average ticket value is $316
- Local airport is Pocatello Regional
- Top volume airport is Salt Lake City; one travel agent's customers use it 100 percent of time and another agency's customers use it 55 percent of time because of price, location, and schedule

- Other airports that are ranked by the travel agents are Pocatello Regional because it is the local airport, Boise Air Terminal because of lower fares, and Idaho Falls Regional because it is a short distance away for some travelers
- Top air travel destinations include Las Vegas, Orlando, Anaheim, Mexico, and Europe
- Minimum difference in round trip fares that will cause the customers to drive to an alternate airport needs to be $100
- Maximum distance that customers are willing to drive to a non-local airport is 175 miles

Figure 1-5: Top Volume Airports - Pocatello
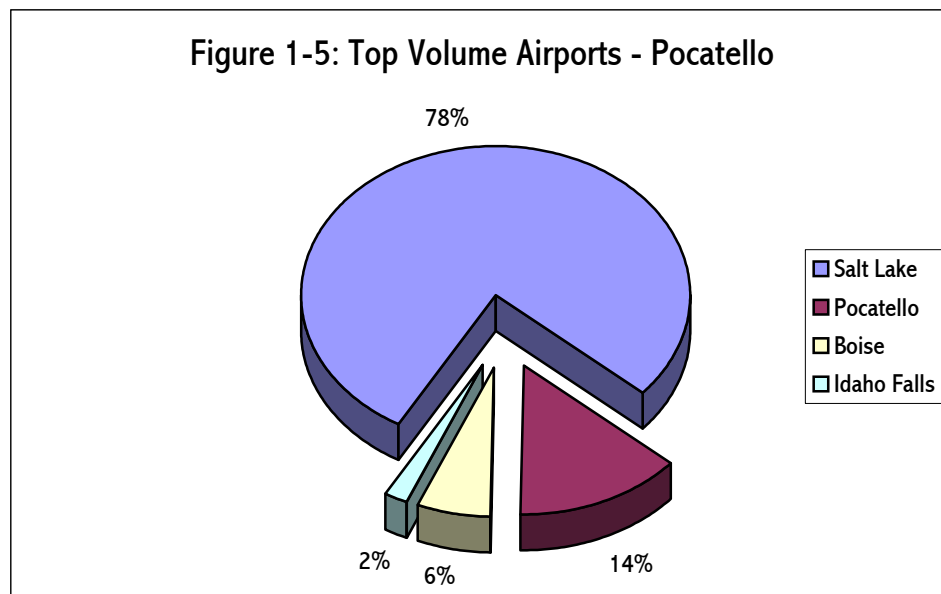
Twin Falls (**Figure 1-6**)

- 3 travel agents responded from Twin Falls
- Dollar volume of airline sales range from $500,000 to $1.2 million
- Average ticket value is $300
- Local airport is Joslin Field/Magic Valley Regional
- Top volume airport is Joslin Field/Magic Valley Regional, which is used 42 percent of the time because it is the local airport
- Boise Air Terminal and Salt Lake City are also used because of lower fares
- Top air travel destinations include Seattle, Los Angeles, Portland, and Las Vegas
- Minimum difference in round trip fares that will cause the customers to drive to an alternate airport needs to be $65
- Maximum distance that customers are willing to drive to a non-local airport is 200 miles
- Comments include "having more choices" and "better prices" from Joslin Field/Magic Valley Regional

Figure 1-6: Top Volume Airports - Twin Falls
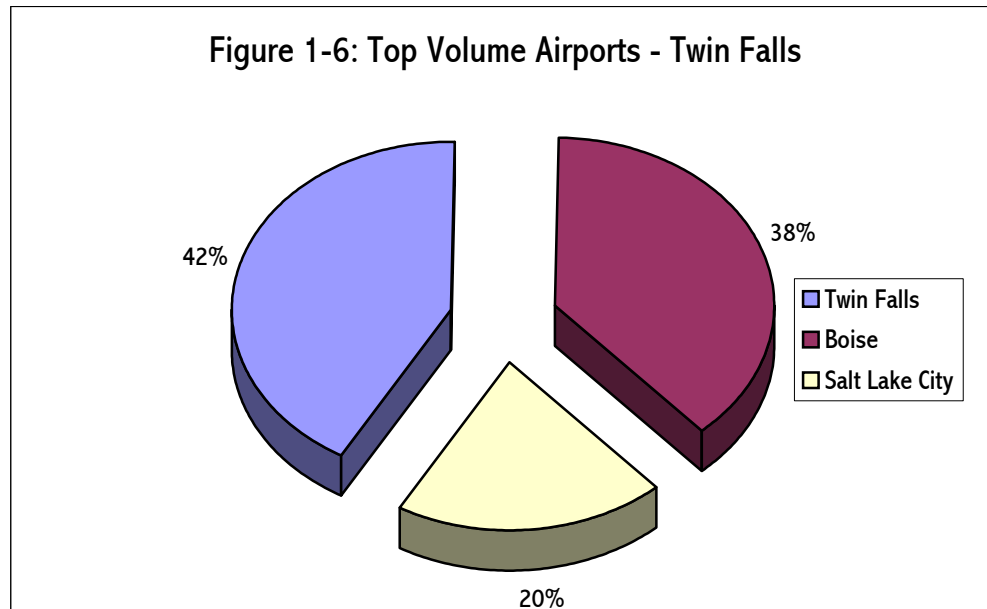
North Idaho (**Figure 1-7**)

- 6 travel agents in North Idaho responded
- Dollar volume of annual airline sales range from $250,000 to $1.9 million
- Average ticket value is $290
- Local airport is Spokane
- Top Airport is Spokane, which is used 94 percent of the time because it is international and is the closest airport to the region
- Other airports used are Missoula and Seattle because of lower fares and convenience
- Top air travel destinations include Seattle, Boise, Southern California, Las Vegas, and Hawaii
- Minimum difference in round trip fares that will cause the customers to drive to an alternate airport needs to be $125
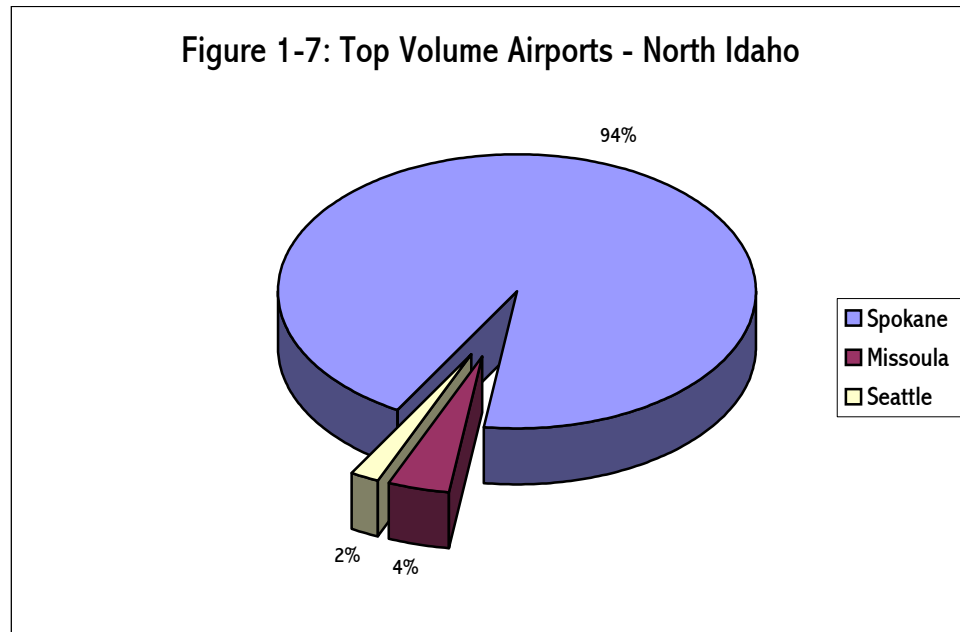- Maximum distance that customers are willing to drive to a non-local airport is 180 miles
- Comments included "no local airport," "there needs to be commercial airport in Coeur D'Alene," and "the service needs to be frequent enough to catch connecting flights from Spokane"

Figure 1-7: Top Volume Airports - North Idaho

Statewide, the average fare differential that will induce a traveler to use another airport is approximately $102. The lowest fare differential occurs at Joslin Field/Magic Valley Regional (Twin Falls), where travelers need to save only $65 per ticket at another airport to forego use of the local airport. The greatest fare differential occurs at Boise Air Terminal, where passengers must save $150 in order to use another airport.   Pocatello and Idaho Falls users reported an alternate-choice fare differential that was at the State average ($102 in savings). **Figure 1-8** shows these fare differentials for each of the six regions.

Figure 1-8: Alternate-Choice Fare Differentials
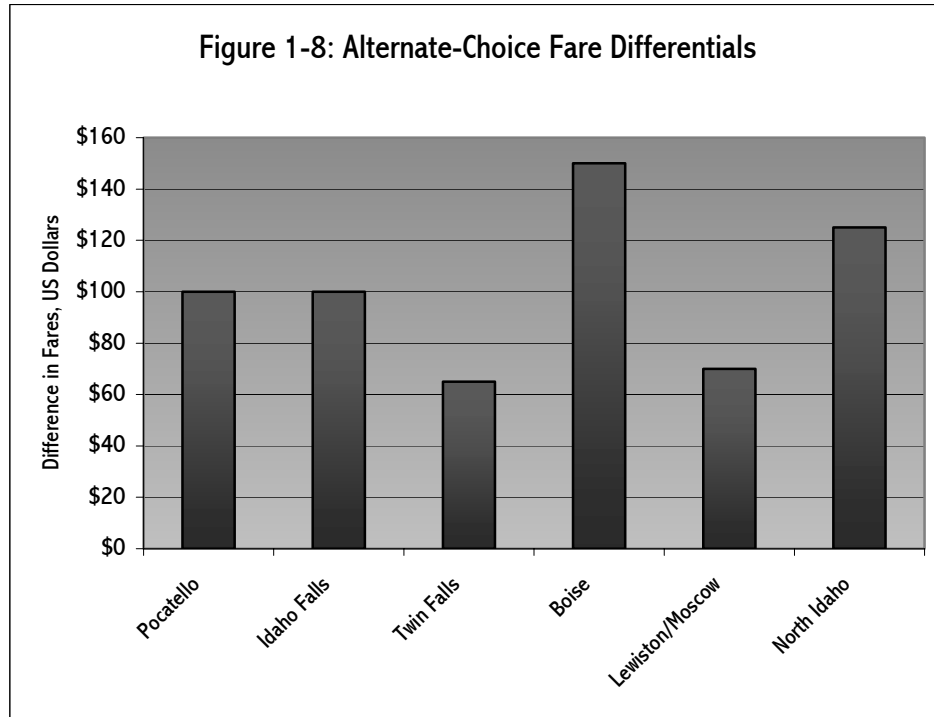
Similar findings can be found in the alternate-choice distance differentials. The average maximum distance that Idaho travelers will drive to board a lower cost flight is approximately 225 miles. The range of distances reported is from 150 in Lewiston/Moscow to 400 in Boise. These figures represent the relative level of airline service at each airport, as well as the service levels at nearby competing airports. For example, to obtain comparable service at a lower fare, Boise passengers would drive up to 400 miles (which would allow these passengers to board at Salt Lake City, Portland, Seattle, or Spokane), but these travelers would need to save $150 per ticket to do so. This stands as a testament to the level of service and price competitiveness at Boise Air Terminal. Twin Falls passengers will drive only up to 200 miles (presumably to either Boise or Salt Lake City) to save just $65 per ticket, illustrating the perceived level of service and cost at that airport. **Figure 1-9** shows graphically the distance differentials reported by travel agents in each of the six regions.

Figure 1-9: Alternate-Choice Distance Differentials
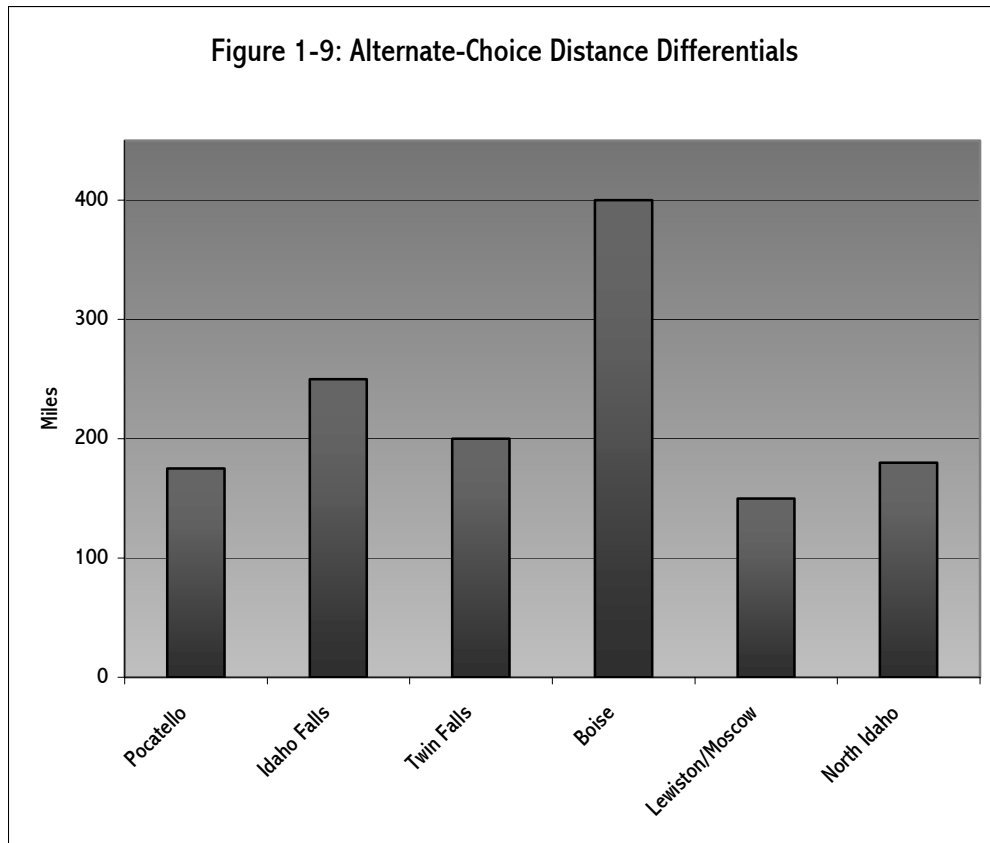
Passenger Surveys

Survey Method. In addition to the travel agent survey, a passenger intercept interview process also took place at each of Idaho's commercial service airports. A survey form was designed by Wilbur Smith Associates to gain insight into passenger travel patterns and needs, and the survey was administered in an interview format. This allowed the interviewer to probe for details as necessary, as well as freeing the respondent somewhat from the intrusion of the process. The survey was designed to be administered to travelers before they entered security screening, and the interview generally took less than one minute to complete. **Figure 1-10** below presents the survey as it was administered for this report.

Figure 1-10: Idaho Air Service Passenger Survey

Air Passenger Demand Study
PASSENGER SURVEY

Idaho Transportation Department, Division of Aeronautics

AIRPORT WHERE SURVEY COMPLETED: _____

1. ARE YOU A CONNECTING, RESIDENT, OR VISITOR PASSENGER:

☐ Connecting passenger
☐ Resident passenger   City/Town and State of residence   _____
☐ Visitor passenger   City and State of Residence   _____

2. WHAT IS YOUR FINAL DESTINATION FOR TODAY'S TRIP? _____

3. HOW WAS YOUR TICKET FOR TODAY'S TRIP PURCHASED?

☐ Travel Agent   ☐ Directly from Airline/Ticket Counter
☐ Corporate/In-house   ☐ Internet
☐ Other (please specify)   _____

<<<RESIDENT PASSENGERS ONLY>>>

> PLEASE ESTIMATE THE *TOTAL NUMBER OF AIRLINE TRIPS* THAT YOU TOOK IN THE LAST YEAR:
_____

> WHICH AIRPORTS DID YOU USE TO BEGIN AIRLINE SERVICE TRIPS IN THE LAST YEAR?

Airport	No. Times Used
☐ THIS AIRPORT	_____
☐ Boise	_____
☐ Twin Falls	_____
☐ Pocatello	_____
☐ Idaho Falls	_____
☐ Hailey/Sun Valley	_____
☐ Lewiston	_____
☐ Pullman/Moscow	_____
☐ Spokane	_____
☐ Missoula	_____
☐ Salt Lake	_____
☐ Other (specify):	_____

<<<VISITOR PASSENGERS ONLY>>>

> PLEASE ESTIMATE THE *TOTAL NUMBER OF AIRLINE TRIPS* TO IDAHO THAT YOU TOOK IN THE LAST YEAR:
_____

> WHICH AIRPORTS DID YOU FLY INTO WHEN VISITING YOUR IDAHO DESTINATIONS LAST YEAR?

Airport	No. Times Used	Destination City
☐ THIS AIRPORT	_____	_____
☐ Boise	_____	_____
☐ Twin Falls	_____	_____
☐ Pocatello	_____	_____
☐ Idaho Falls	_____	_____
☐ Hailey/Sun Valley	_____	_____
☐ Lewiston	_____	_____
☐ Pullman/Moscow	_____	_____
☐ Spokane	_____	_____
☐ Missoula	_____	_____
☐ Salt Lake	_____	_____
☐ Other (specify):	_____	_____
	_____	_____

Source: Wilbur Smith Associates

Passenger surveys were administered to a total of 1600 travelers at Idaho's airports. Sun Valley, Idaho Falls, Pocatello, and Twin Falls were surveyed at various times during the week of September 23-27, 2002, and Boise, Lewiston, and Pullman-Moscow passengers were surveyed September 29-October 3, 2002. Survey periods were coordinated to attempt to meet passengers on each

outbound flight at least once at each airport. At Boise Air Terminal, periods of flights in connecting banks were paid particular attention. Over 1250 of the surveys were completed at Boise Air Terminal, 160 at Idaho Falls Regional, 25 at Lewiston/Nez Perce County, 71 at Pocatello Regional, 18 at Pullman-Moscow Regional, 60 at Friedman Memorial (Sun Valley), and 29 at Joslin Field/Magic Valley Regional (Twin Falls).

Survey Results. The results of the survey, organized by question, are presented below.

Question 1: Are you a connecting, resident, or visitor passenger?
Since this question was asked of passengers outside of the security checkpoint, there were few connecting passengers interviewed for the survey; those who did are assumed to have left the secure area of the terminal during a layover. Resident passengers accounted for 878 surveys, or about 54 percent of those questioned. Visitors to the State numbered 713, or approximately 45 percent, and the 9 connecting passengers questioned made up 1 percent of the total respondents. The results of the survey, by airport, are presented in **Table 1-1**.

Table 1-1
Traveler Types, By Airport

Survey Airport	Passenger Type	Count	% of Airport
Boise Air Terminal	Connecting	8	1%
	Resident	710	57%
	Visitor	523	42%
Idaho Falls Regional	Connecting	1	1%
	Resident	57	36%
	Visitor	99	63%
Lewiston/Nez Perce County	Resident	16	67%
	Visitor	8	33%
Pocatello Regional	Resident	43	61%
	Visitor	28	39%
Pullman/Moscow Regional	Resident	13	72%
	Visitor	5	28%
Friedman Memorial (Sun Valley)	Resident	23	38%
	Visitor	37	62%
Joslin Field/Magic Valley (Twin Falls)	Resident	16	55%
	Visitor	13	45%
State Total	*Connecting*	*9*	*1%*
	Resident	*878*	*54%*
	Visitor	*713*	*45%*

Source: Wilbur Smith Associates

It must be noted that responses to Question 1 at Lewiston/Nez Perce County and Pullman-Moscow Regional-Moscow airports are somewhat skewed. Due to the proximity of these airports to the Idaho-Washington border, many passengers classified themselves as a resident of the area without regard for which state they lived in. Obviously, these airports attract both Idaho and Washington

passengers, so the reader should not assume that these airports necessarily serve proportionally fewer visitors than the average for all airports. In fact, with two major universities located in this area it can be assumed that the visitor-resident ratio is higher over a year's time than is captured here. Therefore, decisions at these airports as a result of this passenger survey data should be made with care.

Question 2: What is your final destination for today's trip?
This question asked passengers to report the city and state of their trip destination on the day of the survey. Since no single non-Idaho city made up more than about three percent of the responses, the answers to this question were grouped by state. **Table 1-2** below shows these responses for North American destinations, and **Figure 1-11** shows graphically the regional destinations within the lower 48 states.

Destinations in the Northwest region, with Washington in particular, were the most popular destinations for travelers at Idaho's airports. Exactly 60 percent of Idaho's air travelers that participated in this survey had destinations west of the Rockies (in the Northwest and Southwest regions), and 41 percent of Idaho's travelers had destinations in west coast states (Washington, Oregon, and California). The least popular destination region in the lower 48 states among Idaho's commercial air service customers was the mid-south, with only 1.9 percent of travelers reporting destinations in those five states.

Table 1-3 shows the top ten destination states as identified by the survey respondents. The State of Washington was listed as either the first or second most popular destination at all seven airports, and California was in the top two at five airports. These findings confirm the data shown in Table 1-2. As might be expected, travelers at Boise Air Terminal identified their top destinations as very much the same as those for the entire State, with the top three spots filled by the three West Coast states.

Question 3: How was your ticket for today's trip purchased?
Passengers were asked to report the method of purchase of their ticket for the trip taken on the day of the survey. Check-boxes were provided for "Corporate/In-House Travel Departments," "Direct Purchase from Airline," "Purchased on Internet," and "Purchased Through Travel Agent." A space was provided to allow the interviewer to record methods of purchase not provided. The results, sorted by airport, are shown in **Table 1-4**.

Table 1-2

Passenger Destinations

by Region and State/Province, as reported in Passenger Surveys

Region State	Count	% of Total	Region State	Count	% of Total
Northwest	**500**	**33.6%**	**Mid-South**	**28**	**1.9%**
Idaho	85		Alabama	5	
Oregon	103		Arkansas	5	
Washington	312		Louisiana	4	
			Mississippi	2	
Southwest	**393**	**26.4%**	Tennessee	12	
Arizona	50				
California	194		**Southeast**	**75**	**5.0%**
Nevada	77		Florida	17	
Utah	72		Georgia	32	
			North Carolina	12	
North Central	**96**	**6.5%**	South Carolina	8	
Iowa	6		Virginia	6	
Minnesota	31				
Montana	32		**Northeast**	**76**	**5.1%**
Nebraska	11		Connecticut	1	
North Dakota	5		Delaware	0	
South Dakota	7		Dist. Of Columbia	14	
Wyoming	4		Maine	2	
			Maryland	11	
South Central	**167**	**11.2%**	Massachusetts	11	
Colorado	84		New Hampshire	3	
Kansas	10		New Jersey	7	
New Mexico	13		New York	18	
Oklahoma	6		Pennsylvania	20	
Texas	54		Rhode Island	2	
			Vermont	1	
Midwest	**130**	**8.7%**			
Illinois	33		**Pacific**	**14**	**0.9%**
Indiana	11		Alaska	4	
Kentucky	5		Hawaii	10	
Michigan	9				
Missouri	30		**Canada**	**4**	**0.3%**
Ohio	21		British Columbia	4	
West Virginia	2				
Wisconsin	19		**Mexico**	**3**	**0.2%**

Source: Wilbur Smith Associates

Figure 1-11
Idaho Passenger Destinations by U.S. Region (excl. AK and HI), from Survey Data

Source: Wilbur Smith Associates
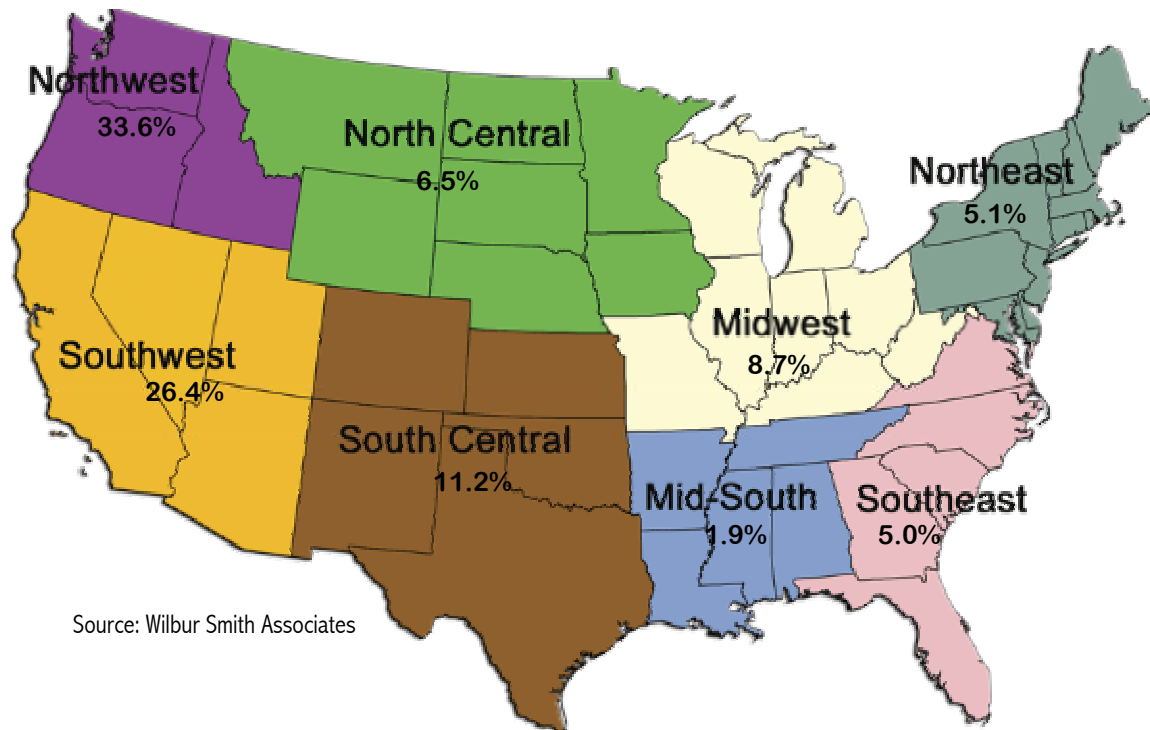
Table 1-3

Top Ten Destination States (excluding Idaho)
by Idaho Air Services Market, as reported in Passenger Surveys

Rank	Boise	Idaho Falls	Lewiston	Pocatello	Pullman-Moscow	Friedman Memorial	Twin Falls
1	Washington	California	Minnesota	Washington	Washington	Washington	Washington
2	California	Washington	Washington	Nevada	California	California	California
3	Oregon	Colorado	Indiana	Alabama	British Columbia	Indiana	Massachusetts
4	Colorado	Oregon	Massachusetts	California	Alaska	Dist. Of Columbia	North Carolina
5	Nevada	Georgia	Michigan	Arizona	Illinois	Oregon	South Carolina
6	Utah	Texas	Montana	Georgia	Nevada	Florida	Utah
7	Arizona	Utah	Oregon	Ohio	Oregon	Minnesota	Colorado
8	Texas	Pennsylvania	Tennessee	Colorado	Texas	New Hampshire	Dist. Of Columbia
9	Montana	Wisconsin		Dist. Of Columbia		New York	Florida
10	Missouri	Hawaii		Illinois		Texas	Georgia

Source: Wilbur Smith Associates

Note: Blank spaces left for markets where fewer than ten destination states were named by respondents.

Table 1-4
Method of Purchase by Airport

Survey Airport	Purchase Type	Count	% of Airport	Other Type-Note
Boise Air Terminal	Corporate	159	13%	
	Direct from Airline	210	17%	
	Internet	653	53%	
	Other	5	0%	Gift
	Other	3	0%	Group Deal
	Other	2	0%	Spouse Purchased
	Travel Agent	209	17%	
Idaho Falls Regional	Corporate	25	16%	
	Direct from Airline	37	24%	
	Internet	53	34%	
	Other	1	1%	Church
	Other	1	1%	Gift
	Other	1	1%	Military
	Travel Agent	39	25%	
Lewiston/Nez Perce County	Corporate	9	38%	
	Direct from Airline	3	13%	
	Internet	7	29%	
	Travel Agent	5	21%	
Pocatello Regional	Corporate	16	23%	
	Direct from Airline	12	17%	
	Internet	23	32%	
	Travel Agent	20	28%	
Pullman/Moscow Regional	Corporate	4	22%	
	Direct from Airline	1	6%	
	Internet	5	28%	
	Travel Agent	8	44%	
Friedman Memorial (Sun Valley)	Corporate	7	12%	
	Direct from Airline	15	25%	
	Internet	21	35%	
	Other	1	2%	Gift
	Other	1	2%	In-House Ticket
	Travel Agent	15	25%	
Joslin Field/Magic Valley (Twin Falls)	Corporate	4	14%	
	Direct from Airline	8	28%	
	Internet	5	17%	
	Other	1	3%	Jump Seat - Comm. Pilot
	Travel Agent	11	38%	
State Total	*Corporate*	*224*	*14%*	
	Direct from Airline	*286*	*18%*	
	Internet	*767*	*48%*	
	Other	*17*	*1%*	
	Travel Agent	*306*	*19%*	

Source: Wilbur Smith Associates

The sum totals of the various purchase methods show that the internet is the predominant method of airline ticket purchase in Idaho, with nearly half of all passengers using electronic means.

Passengers at Boise Air Terminal are even more likely to use the internet, with 53 percent reporting use of that method. Although Lewiston/Nez Perce County Airport's sample size for this survey was somewhat small, it is evident from the data that a significant number of its passengers travel on tickets bought by corporate travel departments. This might be a result of the weekday time frame of the survey period, or it may be that leisure travelers are more likely to use a different airport. Another highlight from this table is the proportion of travelers at Pullman-Moscow Regional-Moscow Airport that used a travel agent to book their flights. Pullman-Moscow Regional passengers are more than twice as likely to use a travel agent as air travelers in the rest of the State.

Question 4A (Residents of Idaho): Please estimate the total number of airline trips you took in the last year.
Question 4A (Visitors to Idaho): Please estimate the total number of airline trips to Idaho that you took in the last year.
Beginning at Question 4, the survey split into two separate questionnaires. Depending on the response to Question 1 (see above), the subject of Question 4 would be slightly different. For Question 4A, the lines of questioning were similar for each sub-grouping. The intent of the two questions was to identify the frequency with which travelers used each airport. The results of Question 4A are shown in **Table 1-5** below.

Table 1-5
Average Trips per Year
(by Residents and Visitors)

Airport	Residents	Visitors
Boise	12	4
Idaho Falls	9	5
Lewiston	16	11
Pocatello	10	5
Pullman/Moscow	13	4
Hailey/Sun Valley	13	3
Twin Falls	13	5
State Average	*12*	*4*

Source: Wilbur Smith Associates

The data in **Table 1-5** seem to show a geographic component to the respondent's travel patterns. Residents in the eastern part of the State that use Idaho Falls Regional and Pocatello Regional airports report fewer trips, on average, in a year's time than users of airports in the south-central part of the State at Friedman Memorial (Sun Valley) and Joslin Field/Magic Valley Regional (Twin Falls). Travelers at airports in Pullman-Moscow and especially in Lewiston also report higher-than-average use of those airports. One surprising finding is the relative infrequency of visitor use of Hailey's airport. Since this is the airport closest to the tourist centers of Ketchum and Sun Valley, it would be expected that visitors would use this airport more frequently. The difference is largely

due to the time of year the survey was administered; the airport's management reported that late September is the area's slack time in terms of tourism.

Question 4B (Residents): Which airports did you use to begin airline trips in the last year?
Question 4B (Visitors): Which airports did you fly into when visiting your Idaho destinations last year?

These questions were designed to assess the frequency of use of each airport by residents of or visitors to all parts of the State. In addition, checkboxes were provided for out-of-state airports in Missoula, Salt Lake City, and Spokane, to attempt to quantify passenger leakage from Idaho to competing airports in neighboring states. The results of these questions are shown in **Table 1-6** below. The numbers in the table represent the sum total of all trips in the last 12 months reported by the survey respondents.

Table 1-6
Trips From Idaho Airports Reported in Surveys
(previous 12 months)

	Interviewed At:						
Using:	**Boise**	**Idaho Falls**	**Lewiston**	**Pocatello**	**Pullman**	**Sun Valley**	**Twin Falls**
Boise	1338	45	3	55	0	26	12
Idaho Falls	33	297	1	43	0	0	0
Lewiston	7	7	140	5	3	0	0
Pocatello	8	5	0	88	1	0	0
Pullman	0	0	32	0	116	14	0
Sun Valley	13	0	0	0	0	215	0
Twin Falls	21	0	0	0	0	9	177
Missoula	0	0	0	0	0	0	0
Salt Lake City	6	6	0	7	0	0	3
Spokane	28	3	37	11	45	0	0
Other Airports	12	0	0	12	0	0	0
Total Trips Reported	*1466*	*363*	*213*	*221*	*165*	*264*	*192*

Source: Wilbur Smith Associates

The data in Table 1-6 shows that for most markets in the State, Boise Air Terminal was the top alternative airport for passengers beginning an airline trip. A notable exception is in the northern part of the State (at Lewiston/Nez Perce County and Pullman-Moscow Regional), where Spokane International becomes the primary alternative for air travelers. This difference is undoubtedly the result of the State's geography and ground transportation system, which makes a driving trip from the panhandle to Boise a time-consuming proposition. Also of note is the lack of mention of Missoula as an alternative for airline travel. Since the surveys were administered in airports and not necessarily population centers in the State, it is not surprising that Missoula was not mentioned. Had the survey been administered in Coeur d'Alene or Kellogg or Salmon, it might be anticipated that Missoula would have appeared as an alternative for some travelers. The "Other Airports" row in Table 1-6 included responses such as Denver, Portland, and Seattle.

Parking Lot Inventories

Survey Method. Wilbur Smith Associates staff performed vehicle counts at the parking lots of all Idaho airports. Efforts were made to canvass the lots at various times of day and week to correct for the effects of business or weekend travelers. In the case of Boise and Idaho Falls, lot management provided car counts from their own records. The schedule of the inventories is presented in **Table 1-7**. For out-of-state airports, records were requisitioned from parking lot management companies at each airport. Airports serving Spokane and Missoula provided one month of overnight parking lot inventories. Salt Lake City International provided results from a 1995 Passenger Demand Study produced for that airport.

During each inventory period, a staff member tallied license plate county codes of each car in the airport's parking facility. Idaho's license plate county codes were obtained from the State's Transportation Department and tally sheets were constructed accordingly. For out-of-state vehicles, the total number of cars was counted, since states surrounding Idaho do not identify county of origin on license plates. Vanity, commercial, government, or specialty plates were counted separately if no county information was displayed.

The number of cars at each airport in each sample period can be used to help estimate the demand for commercial air service within each county. While cars and passengers do not equate to a one-for-one relationship, the proportion of cars from various geographic areas provides an estimate of the various areas where an airport's passengers originate.

The average sample sizes for the parking lot survey were as follows:
- Boise Air Terminal: 1222 cars
- Idaho Falls Regional: 143 cars
- Lewiston/Nez Perce County: 143 cars
- Pocatello Regional: 192 cars
- Pullman-Moscow Regional: 34 cars
- Friedman Memorial (Sun Valley): 69 cars
- Joslin Field/Magic Valley Regional (Twin Falls): 101 cars

The results of the vehicle inventory effort will be used to calibrate the passenger demand model presented in Chapter 2, *Passenger Demand Estimates and Allocation.* The data provided through the car counts is extensive and is therefore not presented in this chapter.

Table 1-7
Idaho Parking Lot Inventory Schedule

Survey Location/Day	Time	Date	Day of Week
Boise Day 1	12:00 AM*	9/22/2002	Sunday
Boise Day 2	12:00 AM*	9/23/2002	Monday
Boise Day 3	12:00 AM*	9/24/2002	Tuesday
Boise Day 4	12:00 AM*	9/25/2002	Wednesday
Boise Day 5	12:00 AM*	9/26/2002	Thursday
Boise Day 6	12:00 AM*	9/27/2002	Friday
Boise Day 7	12:00 AM*	9/28/2002	Saturday
Idaho Falls Day 1	12:00 AM*	9/16/2002	Monday
Idaho Falls Day 2	12:00 AM*	9/17/2002	Tuesday
Idaho Falls Day 3	12:00 AM*	9/18/2002	Wednesday
Idaho Falls Day 4	12:00 AM*	9/19/2002	Thursday
Idaho Falls Day 5	12:00 AM*	9/20/2002	Friday
Idaho Falls Day 6	12:00 AM*	9/21/2002	Saturday
Idaho Falls Day 7	12:00 AM*	9/22/2002	Sunday
Lewiston Day 1	10:00 AM	9/30/2002	Monday
Lewiston Day 2	6:30 AM	10/1/2002	Tuesday
Pocatello Day 1	2:30 PM	9/23/2002	Monday
Pocatello Day 2	2:00 PM	9/25/2002	Wednesday
Pocatello Day 3	2:30 PM	9/27/2002	Friday
Pullman, WA Day 1	1:30 PM	9/30/2002	Monday
Pullman, WA Day 2	10:30 AM	10/02/2002	Wednesday
Sun Valley / Hailey Day 1	12:30 PM	9/23/2002	Monday
Sun Valley / Hailey Day 2	9:00 AM	9/25/2002	Wednesday
Sun Valley / Hailey Day 3	5:30 PM	9/27/2002	Friday
Twin Falls Day 1	12:00 PM	9/24/2002	Tuesday
Twin Falls Day 2	8:30 AM	9/26/2002	Tuesday

Source: Wilbur Smith Associates
*Daily Boise and Idaho Falls parking lot data provided by lot management,
counts taken nightly at midnight

The surveys completed for the system diagnostics section allow a better understanding of the current state of Idaho's air service options. The travel agent survey contained questions designed to assess the travel patterns of Idaho's air service consumers, especially as those patterns pertain to airport choice. The passenger survey asks similar but more in-depth questions of the passengers themselves, as well as questions aimed at identifying popular travel destinations. The parking lot inventories are still another measure of airport choice by passengers of various areas within the State. The data provided by these surveys serve as useful tools for estimating travel patterns and airport choice by all of Idaho's air travelers.

Statewide Socioeconomic Data and Trends

A diagnostic analysis of Idaho's commercial air service system must include some discussion of demographic and economic trends in the State. In order to assess the current state of Idaho's commercial air service system and to determine how it fits with the State's travelers' needs, an understanding of the users of the system must be provided. For this section, data was compiled from a variety of sources; indicators that include population, employment, and per capita personal income were obtained. These measures, including some projections, allow for a greater understanding of how demand for commercial air service in the State has changed and will change over time.

Population. Population in the State of Idaho grew at an annualized rate of 2.5 percent between the 1990 and 2000 censuses. The fastest growing counties are generally those around the City of Boise. Ada and Canyon Counties grew 3.8 percent per year on average, while Boise County grew 6.5 percent and Elmore County grew 3.2 percent annually. Counties considered to be in resort areas also grew faster than the rest of the State between 1990 and 2000. Blaine, Teton and Kootenai Counties grew at 3.3, 5.7 and 4.4 percent respectively each year in this period. Two counties, Butte and Shoshone, saw slight decreases in population between 1990 and 2000. The State's population increased nearly four times as fast as the U.S. population, and even grew faster than the Northwest as a whole. **Table 1-8** shows Idaho's population data and comparisons to the Northwest and the United States, and **Figure 1-12** shows a map of Idaho's population density.

Overall population in Idaho is expected to grow somewhat more slowly through 2010 than the annual growth rates experienced in the 1990s and 2000. Only five counties are projected to have annual average increases in population of more than 2 percent through 2010; Ada, Blaine, Boise, Canyon, and Valley counties should see these higher average annual growth rates. Counties in more rural areas are expected to generally grow at a slower rate than the state average. Despite the slower growth rates over the next two years compared to the 1990s, Idaho's population is expected to increase at a slightly faster rate (1.6 percent annually) than the Northwest as a whole (1.4 percent annually), and at twice the rate of the nation.

Table 1-8

County Population and Growth Rates

(1990 - 2010)

County	1990	2000	2010	AAGR 90-00	AAGR 00-10
Ada	207,522	300,904	378,109	3.8%	2.3%
Adams	3,264	3,476	3,645	0.6%	0.5%
Bannock	66,241	75,565	87,013	1.3%	1.4%
Bear Lake	6,087	6,411	7,078	0.5%	1.0%
Benewah	7,943	9,171	9,766	1.4%	0.6%
Bingham	37,617	41,735	48,120	1.0%	1.4%
Blaine	13,765	18,991	23,283	3.3%	2.1%
Boise	3,552	6,670	8,612	6.5%	2.6%
Bonner	26,757	36,835	44,064	3.2%	1.8%
Bonneville	72,603	82,522	94,506	1.3%	1.4%
Boundary	8,352	9,871	11,808	1.7%	1.8%
Butte	2,915	2,899	3,122	-0.1%	0.7%
Camas	737	991	1,151	3.0%	1.5%
Canyon	90,639	131,441	164,140	3.8%	2.2%
Caribou	6,958	7,304	7,920	0.5%	0.8%
Cassia	19,607	21,416	23,552	0.9%	1.0%
Clark	758	1,022	1,146	3.0%	1.2%
Clearwater	8,494	8,930	9,441	0.5%	0.6%
Custer	4,157	4,342	4,691	0.4%	0.8%
Elmore	21,227	29,130	31,989	3.2%	0.9%
Franklin	9,261	11,329	12,685	2.0%	1.1%
Fremont	10,941	11,819	13,786	0.8%	1.6%
Gem	11,938	15,181	16,869	2.4%	1.1%
Gooding	11,662	14,155	16,660	2.0%	1.6%
Idaho	13,818	15,511	16,410	1.2%	0.6%
Jefferson	16,612	19,155	21,447	1.4%	1.1%
Jerome	15,217	18,342	20,940	1.9%	1.3%
Kootenai	70,400	108,685	130,016	4.4%	1.8%
Latah	30,656	34,935	36,934	1.3%	0.6%
Lemhi	6,926	7,806	8,434	1.2%	0.8%
Lewis	3,520	3,747	3,971	0.6%	0.6%
Lincoln	3,345	4,044	4,749	1.9%	1.6%
Madison	23,757	27,467	32,500	1.5%	1.7%
Minidoka	19,383	20,174	22,186	0.4%	1.0%
Nez Perce	33,845	37,410	39,551	1.0%	0.6%
Oneida	3,512	4,125	4,495	1.6%	0.9%
Owyhee	8,415	10,644	12,115	2.4%	1.3%
Payette	16,444	20,578	22,865	2.3%	1.1%
Power	7,071	7,538	8,295	0.6%	1.0%
Shoshone	13,970	13,771	15,485	-0.1%	1.2%
Teton	3,458	5,999	6,827	5.7%	1.3%
Twin Falls	53,792	64,284	70,695	1.8%	1.0%
Valley	6,149	7,651	9,670	2.2%	2.4%
Washington	8,595	9,977	11,086	1.5%	1.1%
State	*1,011,882*	*1,293,953*	*1,521,830*	*2.5%*	*1.6%*
Northwest	*8,771,209*	*10,636,923*	*12,186,886*	*1.9%*	*1.4%*
United States		*274,500,000*	*297,700,000*	*0.9%*	*0.8%*

Source: U.S. Census Bureau (historic) and Idaho Economics (projected).
AAGR: Average Annual Growth Rate

**Figure 1-12
County Population
Levels**

⊕ Study Airports
    States
County Population
    Less Than 10000
    10001 - 20000
    20001 - 50000
    50001 - 100000
    100001 - 200000
    Greater Than 200000
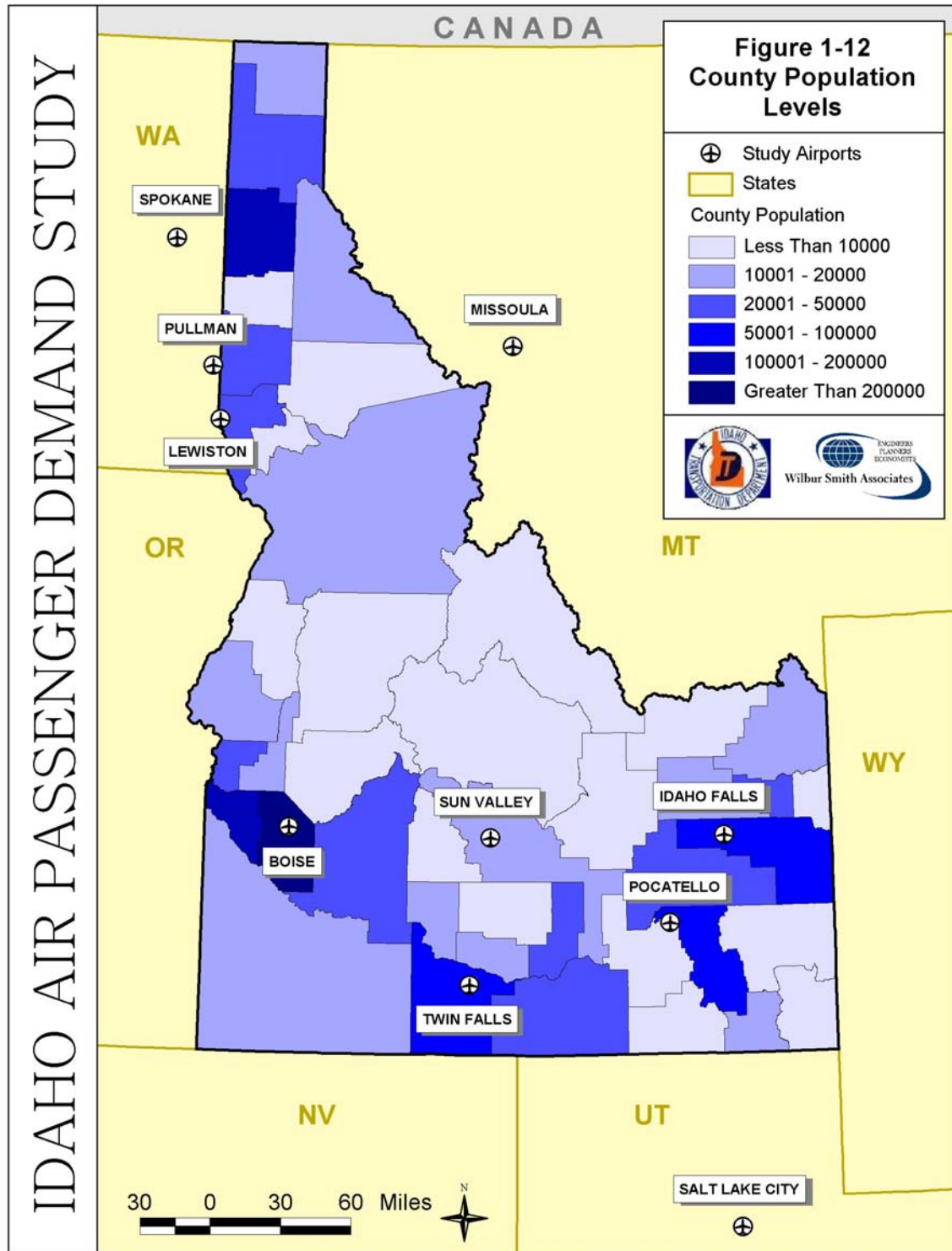
Employment. Employment in Idaho grew at an average annual rate of 3.8 percent between 1990 and 2000. This represents an increase of about 173,600 new jobs in the State in ten years. Ada, Canyon, and Kootenai Counties were responsible for over 60 percent of these new jobs, adding a total of 105,749 employees to the workforce. Custer and Shoshone counties were the only two counties to show decreases in employment over this time period. Despite these decreases, Idaho's total employment grew at twice the average annual rate of the U.S. in the 1990s, and grew significantly faster than the Northwest region as well. **Table 1-9** shows each county's employment level and growth rate over the period 1990-2010.   **Figure 1-13** shows the concentration of employment in Idaho's counties.

Employment in the State is expected to grow at a slower rate through 2010 than it did in the 1990s. The projected annual average growth rate in employment for the State is about 2.1 percent per year through 2010. Ada, Blaine, Boise, and Bonner counties are expected to have employment growth rates approaching 3.0 percent per year, with most other counties growing at or below the State's average annual rate of growth. As is the case with population projections discussed above, most of the projected growth is anticipated to occur in the more developed counties, with rural counties growing at somewhat slower rates. Employment growth in the State is expected to increase faster than both the Northwest region and the United States.

Per Capita Income. On average, each resident of Idaho earned about $23,771 in 2000. This is an increase of almost 50 percent from $15,866 in 1990, or an annual growth rate of 4.1 percent. Some of the largest increases in per capita income came in Ada, Boundary, and Gooding counties, each with average annual growth rates of over five percent. The largest dollar increase in per capita income came in Blaine County, where it increased from $25,000 in 1990 to about $39,500. Ada County experienced a similar increase of about $12,500, and Gooding County's per capita income rose by about $10,000 in the same period. Only Clark County experienced a decrease in its average per capita income in the 1990s, with a decrease of over $9,800. Blaine County had the highest per capita income at 166 percent of the State average for 2000, while Madison County had the lowest at just 62 percent of the statewide figure. The average per capita income in Idaho was lower than the United States' in both 1990 and 2000; in those years Idaho's per capita income was about 70 and 88 percent of the national figure, respectively. However, Idaho's per capita income in these years was higher than that in the Northwest.

Through 2010, Idaho's statewide per capita income is projected to increase about 3.7 percent per year, only slightly slower than the previous decade. Adams, Benewah, Jerome, and Shoshone Counties are expected to lead the State in growth in this measure, each with projected growth rates of more than four percent per year. Boise, Teton, and Valley counties are projected to lag the rest of the State, each with less than three percent annual growth in per capita income. Regardless, these counties are still projected to grow at a moderate rate, and no county is expected to decline. In contrast to the historic figures discussed above, Idaho's per capita income is expected to surpass the United States' average by 2010. **Table 1-10** and **Figure 1-14** below shows details about Idaho's per capita personal income.

Table 1-9

County Employment and Growth Rates

(1990 - 2010)

County	1990	2000	2010	AAGR 90-00	AAGR 00-10
Ada	108,098	179,966	236,988	5.2%	2.8%
Adams	928	935	1,037	0.1%	1.0%
Bannock	24,160	33,663	38,794	3.4%	1.4%
Bear Lake	1,155	1,676	1,846	3.8%	1.0%
Benewah	2,873	3,535	4,378	2.1%	2.2%
Bingham	11,486	13,022	15,576	1.3%	1.8%
Blaine	8,012	11,765	15,867	3.9%	3.0%
Boise	927	1,452	1,932	4.6%	2.9%
Bonner	8,600	12,402	16,461	3.7%	2.9%
Bonneville	29,726	39,974	49,396	3.0%	2.1%
Boundary	2,497	3,497	4,326	3.4%	2.2%
Butte	4,618	5,872	6,103	2.4%	0.4%
Camas	184	269	307	3.8%	1.4%
Canyon	30,135	45,947	53,542	4.3%	1.5%
Caribou	2,633	3,058	3,288	1.5%	0.7%
Cassia	6,467	8,136	9,679	2.3%	1.8%
Clark	208	500	555	9.1%	1.1%
Clearwater	3,214	3,452	3,786	0.7%	0.9%
Custer	1,639	1,530	1,613	-0.7%	0.5%
Elmore	4,935	6,349	7,537	2.6%	1.7%
Franklin	1,683	2,323	2,604	3.3%	1.1%
Fremont	2,352	2,612	3,196	1.1%	2.0%
Gem	2,485	2,976	3,134	1.8%	0.5%
Gooding	2,842	4,074	5,073	3.7%	2.2%
Idaho	4,017	4,544	4,634	1.2%	0.2%
Jefferson	3,328	4,582	5,403	3.2%	1.7%
Jerome	3,514	5,652	6,538	4.9%	1.5%
Kootenai	25,469	43,538	56,406	5.5%	2.6%
Latah	11,534	13,828	15,191	1.8%	0.9%
Lemhi	2,057	2,605	2,848	2.4%	0.9%
Lewis	1,164	1,177	1,263	0.1%	0.7%
Lincoln	939	1,056	1,280	1.2%	1.9%
Madison	6,949	10,050	12,704	3.8%	2.4%
Minidoka	6,205	7,178	8,338	1.5%	1.5%
Nez Perce	16,682	21,637	24,075	2.6%	1.1%
Oneida	693	936	1,029	3.1%	1.0%
Owyhee	1,447	1,762	2,053	2.0%	1.5%
Payette	4,217	5,692	6,610	3.0%	1.5%
Power	3,487	3,758	3,918	0.8%	0.4%
Shoshone	5,174	4,902	5,844	-0.5%	1.8%
Teton	684	1,469	1,752	7.9%	1.8%
Twin Falls	22,106	29,953	35,894	3.1%	1.8%
Valley	2,811	3,509	4,398	2.2%	2.3%
Washington	2,178	3,289	3,813	4.2%	1.5%
State	*386,515*	*560,100*	*691,008*	*3.8%*	*2.1%*
Northwest	*5,056,101*	*6,445,442*	*7,475,680*	*2.5%*	*1.5%*
United States		*128,100,000*	*146,460,000*	*1.9%*	*1.3%*

Source: U.S. Census Bureau (historic) and Idaho Economics (projected)

Figure 1-13
County Employment Levels
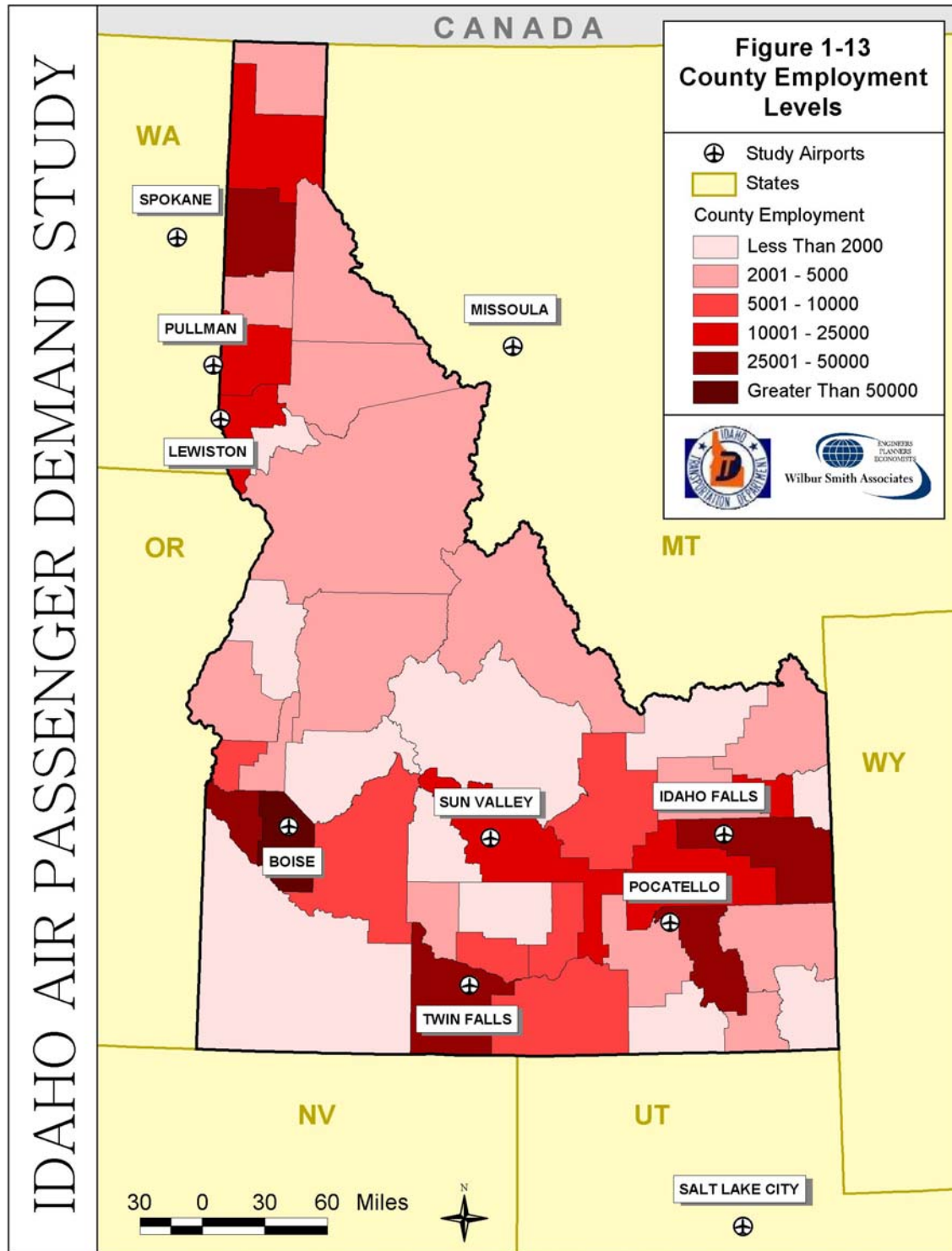
Table 1-10

County Per Capita Income and Growth Rates

(1990 - 2010)

County	1990	2000	2010	AAGR 90-00	AAGR 00-10
Ada	19,912	32,474	47,579	5.0%	3.9%
Adams	13,791	20,729	31,706	4.2%	4.3%
Bannock	14,165	21,334	30,602	4.2%	3.7%
Bear Lake	10,897	16,658	24,273	4.3%	3.8%
Benewah	13,992	19,750	31,352	3.5%	4.7%
Bingham	14,179	19,228	27,233	3.1%	3.5%
Blaine	25,005	39,557	54,806	4.7%	3.3%
Boise	14,615	18,622	24,426	2.5%	2.8%
Bonner	13,375	19,773	28,197	4.0%	3.6%
Bonneville	17,236	23,396	32,851	3.1%	3.5%
Boundary	11,457	18,844	26,860	5.1%	3.6%
Butte	13,043	20,877	30,318	4.8%	3.8%
Camas	14,707	19,280	27,475	2.7%	3.6%
Canyon	13,738	18,557	25,389	3.1%	3.2%
Caribou	14,385	20,654	28,998	3.7%	3.5%
Cassia	16,530	22,896	31,911	3.3%	3.4%
Clark	31,412	21,574	30,035	-3.7%	3.4%
Clearwater	13,863	20,277	29,013	3.9%	3.6%
Custer	15,107	22,924	33,309	4.3%	3.8%
Elmore	17,400	20,598	29,602	1.7%	3.7%
Franklin	11,084	15,959	21,583	3.7%	3.1%
Fremont	12,945	16,418	22,489	2.4%	3.2%
Gem	13,534	19,376	27,781	3.7%	3.7%
Gooding	15,763	26,603	39,146	5.4%	3.9%
Idaho	14,160	17,937	25,707	2.4%	3.7%
Jefferson	12,747	18,964	27,425	4.1%	3.8%
Jerome	15,285	23,816	35,112	4.5%	4.0%
Kootenai	16,012	23,495	33,713	3.9%	3.7%
Latah	14,736	21,279	30,915	3.7%	3.8%
Lemhi	13,160	19,795	28,312	4.2%	3.6%
Lewis	16,995	21,352	30,684	2.3%	3.7%
Lincoln	14,791	19,676	28,035	2.9%	3.6%
Madison	9,555	14,697	20,527	4.4%	3.4%
Minidoka	13,407	18,298	25,814	3.2%	3.5%
Nez Perce	17,066	25,672	36,408	4.2%	3.6%
Oneida	11,734	15,987	22,481	3.1%	3.5%
Owyhee	12,698	16,968	23,018	2.9%	3.1%
Payette	12,590	19,139	26,311	4.3%	3.2%
Power	18,039	20,991	29,877	1.5%	3.6%
Shoshone	14,246	20,202	29,850	3.6%	4.0%
Teton	12,069	14,959	19,866	2.2%	2.9%
Twin Falls	15,353	22,057	32,405	3.7%	3.9%
Valley	17,783	26,712	33,657	4.2%	2.3%
Washington	11,949	17,321	23,861	3.8%	3.3%
State	*15,866*	*23,771*	*34,334*	*4.1%*	*3.7%*
Northwest	*15,714*	*19,556*	*21,667*	*2.2%*	*1.0%*
United States	*22,871*	*26,988*	*30,227*	*1.7%*	*1.1%*

Source: U.S. Census Bureau (historic) and Idaho Economics (projected)

Figure 1-14
County Per Capita
Income Levels
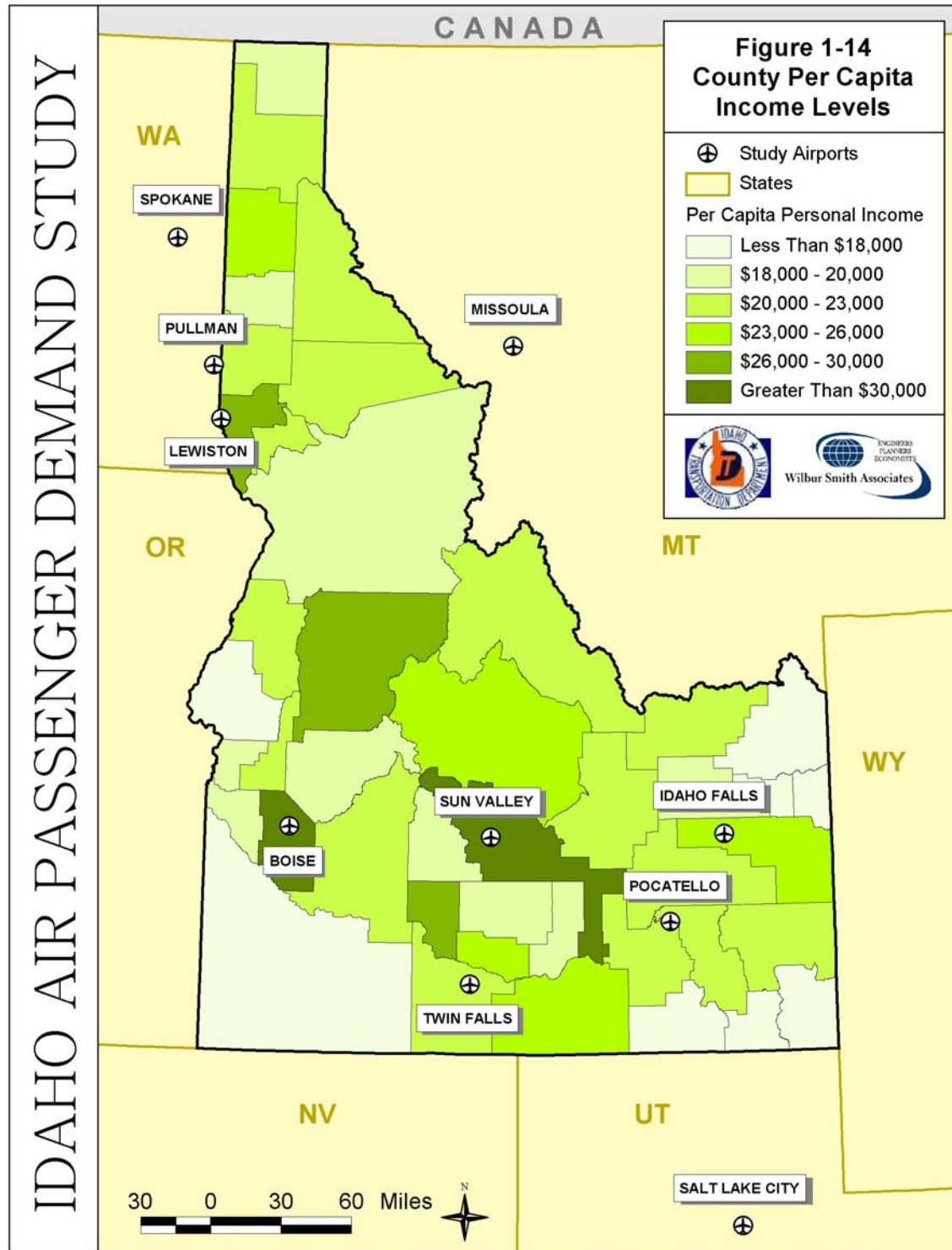
Hotel and Motel Accommodations. The number of hotels and motels in each county can be used as a proxy for actual tourist counts. There is a predictable and positive correlation between the number of tourists in an area and the number of hotels in that area. For this study, the number of hotel establishments in each Idaho county in 2000 was obtained from the U.S. Census Bureau's *County Business Patterns* publication. Additionally, in some small counties (those with few lodging establishments) the Census declines to publish hotel data, since doing so might divulge private business data. In the case of six counties (Camas, Gem, Jefferson, Lincoln, Owyhee, and Payette) Idaho Department of Labor data was used to supplement the Census' data. The resulting hotel/motel counts are presented in **Table 1-11**. The same information is presented in a map in **Figure 1-15**.

Table 1-11
Hotel Establishments by County

County	Hotels	County	Hotels
Ada	57	Gem	1
Adams	3	Gooding	3
Bannock	17	Idaho	17
Bear Lake	4	Jefferson	1
Benewah	2	Jerome	5
Bingham	4	Kootenai	41
Blaine	18	Latah	26
Boise	7	Lemhi	11
Bonner	23	Lewis	2
Bonneville	18	Lincoln	0
Boundary	6	Madison	5
Butte	3	Minidoka	2
Camas	1	Nez Perce	10
Canyon	10	Oneida	1
Caribou	3	Owyhee	0
Cassia	6	Payette	1
Clark	1	Power	3
Clearwater	6	Shoshone	5
Custer	15	Teton	7
Elmore	11	Twin Falls	20
Franklin	4	Valley	17
Fremont	14	Washington	2
Total Idaho Hotels			*413*

Sources: US Census Bureau, *County Business Patterns*, Idaho Department of Labor

Conclusions From Survey and Data Acquisition Efforts

There is generally a positive correlation between population, employment, per capita income, and tourism (represented by hotel data) and demand for commercial airline travel. In other words, as

population, employment, income, and tourism increase, demand for commercial airline travel also has a propensity to increase.

In subsequent portions of this study, demand (in the form of passenger originations) for each Idaho county will be estimated. Even before this exercise is undertaken, it can be anticipated that those counties showing relatively high concentrations of population and employment and tourism activity will also show relatively higher numbers of originating passengers. Further, as income levels rise, the propensity to consume commercial airline service also typically increases.

Population, employment, income, and tourism activity levels, by county, will be used in subsequent sections of this study. This information, in conjunction with travel agent and passenger surveys and parking lot inventories, will be used to established estimates of originating commercial airline travelers for each Idaho county.

Figure 1-15
Hotel Establishments
By County
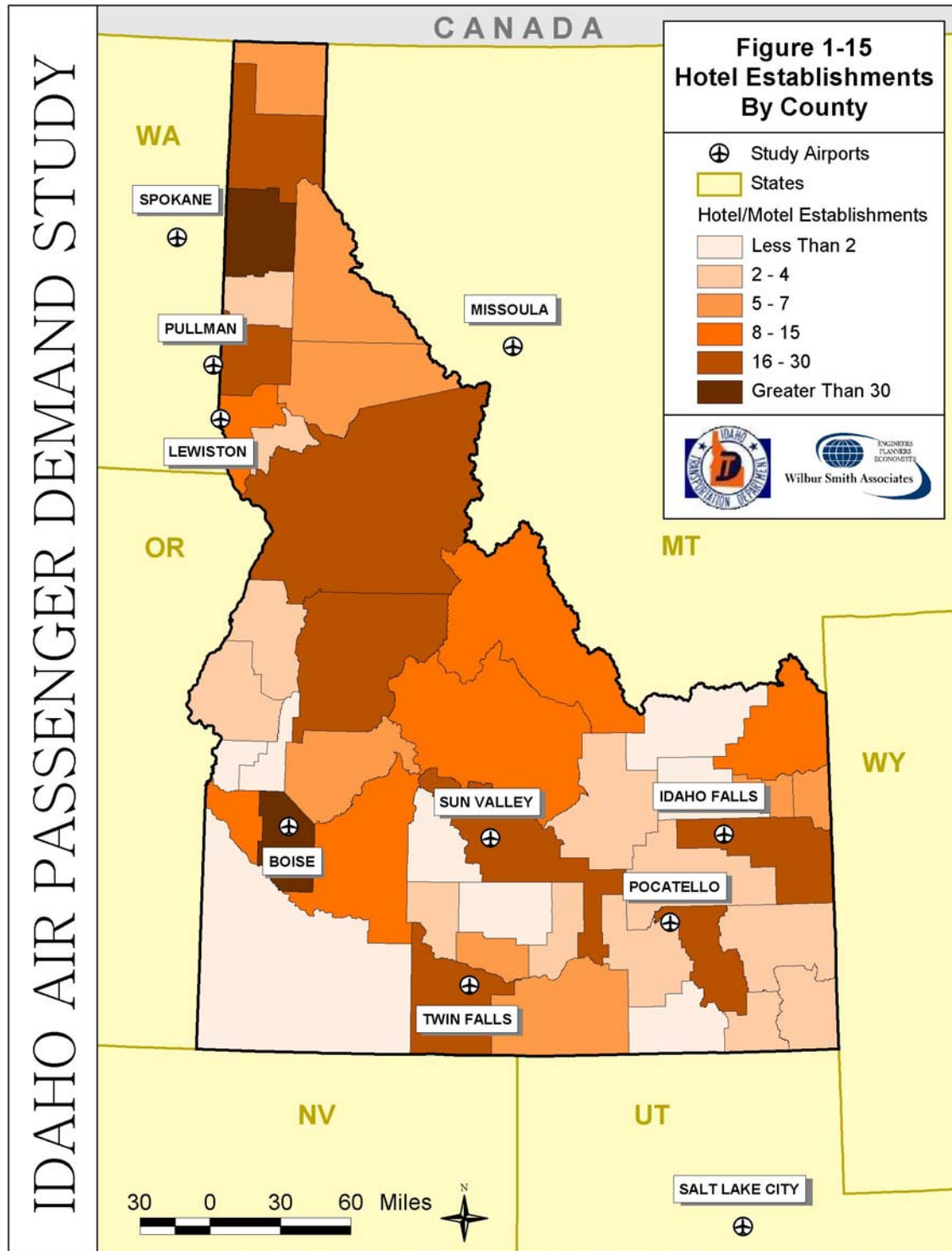
Historic Air Service

Introduction

In order to assess the current status of Idaho's commercial air service, it is important to examine the history of air service at airports around the State. The following section of this chapter will discuss recent history of air service at each airport in Idaho, as well as the implications the history may have on the future of commercial airline travel in the State.

Boise Air Terminal/Gowen Field

Enplanements and Average One-way Fares. Enplanements at Boise Air Terminal have more than doubled since 1992. The largest part of this increase came in the early part of the study period, when Southwest Airlines began offering service. Additional carriers also began offering routes out of Boise after 1994. Enplaned passengers nearly doubled between 1992 and 1997, and continued significant growth through 2001. Average annual growth in enplanements over the ten-year period was in excess of seven percent, by far the highest growth rate among Idaho's airports. Enplanements were down in 2001 from the previous year and again in 2002, due primarily to September 11 and a continuing recession. An enplanement summary can be found in **Table 1-12**. Between 1992 and 1996, average one-way fares at Boise Air Terminal fell from nearly $175 to about $111. Since then, fares have increased to about $117, but the overall change still represents almost a 33 percent decrease from 1992 fares. Again, Southwest's discount business model is credited for the decreased fares. Fares at Boise Air Terminal are the lowest in Idaho, and out of nearby airports in neighboring states, only Spokane has lower fares. **Table 1-12** shows a summary of the airport's fare history.

Table 1-12

Enplaned Passengers and

Average Non-Stop Fares, 1992-2002

Boise Air Terminal/Gowen Field

Year	Enplanements	Average Fare
1992	650,846	173.68
1993	794,032	145.32
1994	959,540	134.77
1995	1,107,519	118.24
1996	1,262,080	110.54
1997	1,261,322	113.76
1998	1,297,457	116.50
1999	1,421,851	120.64
2000	1,510,157	125.34
2001	1,426,187	118.48
2002	1,393,158	117.45
Annual Growth Rate	*7.16%*	*-3.49%*

Sources: *Official Airline Guide*, Airport Records, US DOT

Annual Departures and Destinations Served. The level of nonstop service at Boise Air Terminal has increased dramatically over the last 10 years as shown in **Table 1-12**.   In 1992, the airport had nonstop service to 18 destinations; including 9 major airports in the U.S.   Approximately 43 percent of these flights were intrastate flights, to other Idaho markets or to small markets in Washington. There were 58 seats per flight on average in 1992.

The nature of Boise's air service changed considerably when Southwest Airlines introduced service in 1994. By 1997, Southwest offered nonstop service to six destinations including Las Vegas, Reno, Salt Lake City, Seattle, Spokane, and Portland. Average seats per flight jumped to 90 by 1997 because of this new Southwest service on Boeing 737 jet aircraft. Other major carriers introduced new service in this time frame to San Jose, Oakland, and Minneapolis. Flights to small Idaho and Washington markets were cut in half. By 2002, these short-haul flights made up just 12 percent of the airport's total flights, compared to 43 percent ten years earlier. New long-haul markets added by 2002 included Phoenix, Los Angeles, Sacramento, Dallas/Ft. Worth, and San Diego. Average seats per flight fell slightly between 1997 and 2002 due to the introduction of the 50-seat regional jet on many routes.

Carriers and Equipment Types. Boise Air Terminal has witnessed considerable change in carriers and types of equipment used to serve the market. In 1992, eight carriers provided a mix of jet and turboprop aircraft service at the airport (see **Table 1-14**). Delta, United, and Alaska were the only carriers to provide daily jet service. By 1997, although only six carriers served the market, two new carriers providing jet service entered the market, namely Southwest and Northwest. SkyWest, flying as Delta Connection, also introduced regional jet service to Salt Lake City. By 2002, eight additional carriers had begun nonstop service at the airport. Three of these carriers introduced regional jet service including SkyWest, operating as United Express to San Francisco; Mesa, operating as America West Express to Phoenix, and American Eagle to Dallas/Ft. Worth. By 2002, Horizon introduced regional jet service on ten routes; five of which were brand new markets served from Boise by Horizon. In addition to the growth in regional jet service, low fare carrier Frontier Airlines also introduced new service to Denver in 2002 using mainly 138-seat Boeing 737 aircraft. America West also began jet service to its hub in Phoenix in 2002.

Table 1-13

Annual Nonstop Scheduled Departures and Average Seats per Flight

Boise Air Terminal/Gowen Field

Airport Category	Annual Departures			Average Seats Per Flight		
Destination	1992	1997	2002	1992	1997	2002
Major Airports						
Salt Lake City	2,824	4,677	4,383	84	107	87
Seattle	1,998	3,507	3,820	81	83	81
Portland	1,880	3,160	3,096	53	86	81
Denver	1,095	1,379	1,954	134	118	119
Spokane	1,972	2,096	1,868	43	96	98
San Francisco	1,313	1,457	1,642	114	124	55
Phoenix	0	0	1,133	0	0	90
Reno	366	1,061	1,047	30	137	132
Minneapolis/St. Paul	0	730	1,057	0	113	124
Los Angeles	370	0	751	140	0	50
Las Vegas	0	729	730	0	137	137
San Jose	0	522	624	0	60	50
Sacramento	0	0	623	0	0	59
Oakland	0	158	365	0	60	137
Dallas/Ft. Worth	0	0	421	0	0	67
Chicago-O'Hare	732	458	395	137	122	138
San Diego	0	0	275	0	0	50
Major Airport Total	*12,550*	*19,934*	*24,184*	*83*	*102*	*90*
All Other Airports						
Lewiston	2,760	1,213	1,359	20	35	37
Idaho Falls	1,659	1,315	994	19	37	52
Billings	0	0	400	0	0	16
Pocatello	1,253	302	381	21	37	39
Sun Valley	1,909	901	17	27	37	37
Twin Falls	1,456	378	0	19	27	0
All Other	472	113	250	120	32	16
Other Airport Total	*9,509*	*4,222*		*26*	*35*	
Boise Total	*22,059*	*24,156*	*27,585*	*58*	*90*	*83*
Source: *Official Airline Guide*						

Table 1-14

Carriers Providing Non-Stop Service and Equipment Type
Boise Air Terminal/Gowen Field

| Carrier | Code | Equipment Types | | |
		1992	1997	2002
Horizon	QX	Dash 8/ Fokker 28/ Swearingen Metro	Dash 8/ Fokker 28/ Swearingen Metro	CRJ/ Dash 8-400/ Dash 8/ Fokker 28
Southwest	WN	-	B737-300/ B737-500	B737-300/ B737-500/ B737-700
Delta	DL	B727-200/ B737-200/ B737-300	B727-200	B727-200/ B737-300/ B737-800
SkyWest (Delta Connection)	DL*	Brasilia/ Swearingen Metro	CRJ/ Brasilia	CRJ/ Brasilia
United	UA	B737-500/ B737-300/ B737-200/ B727-200	B737-500/ B737-300/ B737-200/ B727-200	B737-300/ B737-500/ A320/ A319
SkyWest (United Express)	UA*	-	-	CRJ
Northwest	NW	-	DC9/ MD80/ B727-200	A319/ A320
America West	HP	-	-	B737-200/ B737-300/ A319
Mesa	YV	-	-	CRJ
American Eagle	AA*	-	-	CRJ
Frontier	F9	-	-	B737-200/ B737-300
Big Sky	GQ	-	-	Swearingen Metro
Salmon Air	S6	-	-	Piper
Sun Country	SY	-		B737-800
Westair (United Express)	UA*	Brasilia	-	-
Alaska	AS	MD80/ B727	-	-
Empire Airlines	EM	Fokker F27/ Swearingen Metro	-	-
Tahoe Air	XP	B737-200	-	-
Number of Carriers		*8*	*6*	*14*

Source: *Official Airline Guide*

Summary. **Table 1-15** summarizes the passenger and service history at Boise Air Terminal. Enplanements increased by about 114 percent and seats per flight increased over 75 percent between 1992 and 2002 with the introduction of nonstop service by ten new carriers to eleven new destinations. The low fare service offered by Southwest and Frontier has encouraged many passengers in the State to drive to Boise to take advantage of the lower fares offered by these carriers. Intrastate departures from Boise Air Terminal fell dramatically over the ten-year period and average seats per flight rose from 58 in 1992 to 83 by 2002 as more jet aircraft serving longer haul markets were added at Boise Air Terminal.

Table 1-15
Passenger Service Trends Summary, 1992-2002
Boise Air Terminal/Gowen Field

	1992	1997	2002	Change 1992-2002
Enplanements	650,846	1,261,322	1,393,158	114.05%
One-Way Average Fare	173.68	113.76	117.45	-32.38%
Average Weekly Departures	424	465	531	25.24%
Average Weekly Departing Seats	24,793	42,033	44,138	78.03%
Average Seats per Flight	58	90	83	25
Number of Carriers Serving Airport	8	6	14	6
Number of Destinations Served Nonstop	18	29	29	11
Sources: *Official Airline Guide*; Airport Records, U.S. DOT.				

Idaho Falls Regional Airport

Enplanements and Average One-way Fares. Enplanements at Idaho Falls Regional have remained relatively constant over the last ten years. Enplanements peaked in 1993 at just over 125,000. After declining to about 114,000 in 1997, the number of enplanements at Idaho Falls Regional nearly reached its 1992 level before declining again in 2001 and 2002. **Table 1-16** shows Idaho Falls Regional's enplanement data. Fares at Idaho Falls Regional have decreased at a rate of about one half of one percent per year over the last ten years. The average one-way fare from Idaho Falls Regional peaked in 1994 at nearly $196 before falling to a low of $161 in 2001. The average price of a ticket at this airport fell almost $15 in 2001, but again increased by about $9 in 2002. Table 1-16 shows average fare data for the period of 1992 to 2001.

Annual Departures and Destinations Served. As shown in **Table 1-17**, the level of nonstop service at Idaho Falls Regional Airport has fallen slightly over the last ten years. In 1992, the airport had nonstop service to four destinations and three major airports, including Boise, Salt Lake City, and Dallas/Ft. Worth. By 1997, service to Dallas/Ft. Worth had been discontinued. However, by 2002, turboprop service to Denver had been introduced; at the writing of this report, this service had been discontinued. Horizon Airlines dropped an average of two daily departures to Boise over the ten-year period. Average seats per flight declined due to the shift in the types of aircraft serving the market. In 1992 and 1997, Delta and partner SkyWest served Idaho Falls with mix of jet and turboprop aircraft. By 2002, the larger jet aircraft were replaced with 50-seat regional jet aircraft. In January 2003, Big Sky Airlines dropped its Idaho Falls-Denver non-stop service, reducing the number of carriers and non-stop destinations to two each.

Table 1-16

Enplaned Passengers and
Average Non-Stop Fares, 1992-2002

Idaho Falls Regional Airport

Year	Enplanements	Average Fare
1992	124,683	180.35
1993	125,103	181.85
1994	117,165	195.75
1995	114,734	171.71
1996	114,886	170.99
1997	113,763	175.95
1998	118,893	176.01
1999	115,754	179.28
2000	123,791	175.59
2001	118,033	160.85
2002	114,143	169.99
Annual Growth Rate	*-0.80%*	*-0.54%*

Sources: *Official Airline Guide*; Airport Records, US DOT

Table 1-17

Annual Nonstop Scheduled Departures and Average Seats per Flight

Idaho Falls Regional Airport

	Annual Departures			Average Seats Per Flight		
Destination	1992	1997	2002	1992	1997	2002
Salt Lake City	3,024	3,222	3,238	85	63	41
Boise	1,477	853	1,109	21	37	54
Pocatello	852	1,113	352	20	37	62
Denver	0	0	212	0	0	16
Dallas/Ft. Worth	122	0	0	128	0	0
Elko	1	0	0	124	0	0
Idaho Falls Total	*5,476*	*5,188*	*4,911*	*58*	*53*	*44*

Source: *Official Airline Guide*

Carriers and Equipment Types. Over the last ten years, Idaho Falls Regional Airport has been served by mainly by three carriers, Delta, Delta Connection carrier, Skywest, and Horizon. **Table 1-18** shows that, in 1992, the airport was served with a mixture of small turboprop and jet aircraft. Both Delta and American served the airport with jet aircraft. By 2002, both American and Delta discontinued service at Idaho Falls Regional. The Delta jet service was replaced by regional jet service provided by SkyWest. Capacity (departing seats) to Salt Lake City was cut in half between 1997 and 2002. In 2001, Horizon supplemented its nonstop service to Boise with 66-seat Dash 8-400 aircraft.

Table 1-18

Carriers Providing Non-Stop Service and Equipment Type
Idaho Falls Regional Airport

| Carrier | Code | Equipment Types | | |
		1992	1997	2002
Horizon	QX	Dash 8/ Swearingen Metro	Dash 8	Dash 8-400/ Dash 8
Delta	DL	B727-200/ B737-300	B737-300	-
SkyWest (Delta Connection)	DL*	Brasilia/ Swearingen Metro	Brasilia	CRJ/ Brasilia
Big Sky	GQ	-	-	Swearingen Metro
American	AA	MD80	-	-
Number of Carriers		*4*	*3*	*3*
Source: *Official Airline Guide*				

Summary. **Table 1-19** summarizes the passenger and service history at Idaho Falls Regional Airport. Enplanements decreased by about eight and a half percent between 1992 and 2002, despite a decrease in fares of about six percent. Although there has been little change in the number of carriers and destinations served over the last ten years, the decline in available seats (down 32 percent between 1992 and 2002) is due largely to the change in equipment type used to serve the market.

Table 1-19

Passenger Service Trends Summary, 1992-2002
Idaho Falls Regional Airport

	1992	1997	2002	Change 1992-2002
Enplanements	124,683	113,763	114,143	-8.45%
One-Way Average Fare	180.35	175.95	169.99	-5.74%
Average Weekly Departures	105	100	94	-10.48%
Average Weekly Departing Seats	6,146	5,321	4,198	-31.70%
Average Seats per Flight	58	53	44	-14
Number of Carriers Serving Airport	4	3	3	-1
Number of Destinations Served Nonstop	4	3	4	0
Sources: *Official Airline Guide*; Airport Records, U.S. DOT.				

Lewiston/Nez Perce County Regional Airport

Enplanements and Average One-way Fares. Enplanements at Lewiston/Nez Perce County have increased by a growth rate second only in Idaho to Boise's. Lewiston/Nez Perce County has seen increases in enplaned passengers each year except 1998 and 2001. After 1998's decline, the number of enplanements rebounded to a new high. In all, Lewiston/Nez Perce County's

enplanements increased by about 50 percent over the period, or a compounded yearly increase of about four percent. **Table 1-20** shows these data. Fares have declined slightly over the last ten years as well. After beginning at about $142 in 1992, average one-way fares fell to about $133 in 1995 before increasing to $143 in 1998. In 1999, coincident with the rebound in enplanements, average one-way fares fell about 12.5 percent from 1998, to $126. Since then, the average price of a one-way ticket has increased a few dollars to $134. Table 1-20 shows average fare data for Lewiston/Nez Perce County Airport.

Table 1-20
Enplaned Passengers and
Average Non-Stop Fares, 1992-2002

Lewiston/Nez Perce County Airport

Year	Enplanements	Average Fare
1992	39,556	141.74
1993	41,969	136.68
1994	47,031	133.57
1995	48,052	133.34
1996	56,688	139.71
1997	59,642	146.68
1998	56,565	143.13
1999	64,975	125.83
2000	66,964	127.40
2001	61,024	130.14
2002	61,138	134.23
Annual Growth Rate	*4.04%*	*-0.49%*

Sources: *Official Airline Guide*; Airport Records, US DOT

Annual Departures and Destinations Served. As shown in **Table 1-21**, the level of nonstop service offered at Lewiston/Nez Perce County Airport has changed over the last 10 years. In 1992, the airport had an average of 22 daily flight departures to four regularly scheduled destinations. By 1997, the flights to Boise and the triangle flights with Pullman and Seattle were cut in half. However, by 1997 one additional nonstop flight to Seattle was added and new service had begun to Portland and Salt Lake City. By 2002, the airport had nonstop service to two major airports including Boise and Seattle. The number of daily departures decreased to about eight per day by 2002. Average seats per flight nearly doubled between 1992 and 2002 as smaller aircraft were retired.

Table 1-21

Annual Nonstop Scheduled Departures and Average Seats per Flight

Lewiston/Nez Perce County Regional Airport

Destination	Annual Departures			Average Seats Per Flight		
	1992	1997	2002	1992	1997	2002
Boise	2,801	1,178	1,359	20	35	37
Seattle	971	1,138	879	35	37	48
Pullman	3,239	1,276	734	25	35	61
Portland	0	1,390	0	0	19	0
Salt Lake City	0	636	0	0	30	0
Elko	3	3	0	124	124	0
Coeur d'Alene	1,117	0	0	22	0	0
Yakima	42	0	0	19	0	0
Lewiston Total	*8,173*	*5,621*	*2,972*	*24*	*31*	*46*

Source: *Official Airline Guide*

Carriers and Equipment Types. **Table 1-22** presents a summary of the carriers and equipment used to serve Lewiston/Nez Perce County Regional Airport. In 1992, Horizon and Empire offered nonstop service on turboprop aircraft. Tahoe Air provided scheduled jet service to Elko, Nevada, three times per year. Empire Airlines discontinued business in 1995. Between 1992 and 1997, Mesa (United Express) and SkyWest (Delta Connection) entered the market. However, SkyWest pulled out of the market in 1997 and Mesa followed suit in 1998. By 2002, Horizon Airlines was the lone carrier serving the airport with a combination of Dash 8 and Dash 8-400 aircraft.

Table 1-22

Carriers Providing Non-Stop Service and Equipment Type

Lewiston/Nez Perce County Regional Airport

Carrier	Code	Equipment Types		
		1992	1997	2002
Horizon	QX	Dash 8/ Swearingen Metro	Dash 8/ Swearingen Metro	Dash 8-400/ Dash 8
Mesa (United Express)	UA*	-	Beechcraft 1900	-
SkyWest (Delta Connection)	DL*	-	Brasilia	-
Tahoe Air	XP	B737-200	B737-200	-
Empire	EM	Fokker 27/ Swearingen Metro	-	-
Number of Carriers		*3*	*4*	*1*

Source: *Official Airline Guide*

Summary. **Table 1-23** summarizes enplanement, fare and service histories at Lewiston/Nez Perce County Regional Airport. While there has been a dramatic trend of increases in enplanements and decreases in fares, service levels (number of departures and departing seats) declined between 1992 and 2002.

Table 1-23

Passenger Service Trends Summary, 1992-2002

Lewiston/Nez Perce County Regional Airport

	1992	1997	2002	Change 1992-2002
Enplanements	39,556	59,642	61,138	54.56%
One-Way Average Fare	141.74	146.68	134.23	-5.30%
Average Weekly Departures	157	108	57	-63.69%
Average Weekly Departing Seats	3,816	3,354	2,641	-30.79%
Average Seats per Flight	21	31	46	25
Number of Carriers Serving Airport	3	4	1	-2
Number of Destinations Served Nonstop	6	6	3	-3
Sources: *Official Airline Guide*; Airport Records, U.S. DOT.				

Pocatello Regional Airport

Enplanements and Average One-way Fares. The number of enplaned passengers at Pocatello Regional increased between 1992 and 2001 from 35,165 to 45,152, an increase of more than 28 percent or about 2.3 percent per year. Pocatello Regional experienced steady growth each year until 2001, when the airport served about 4,000 fewer passengers than the previous year. Most airports nationwide saw fewer enplanements in 2001 as a result of the terrorist attacks. Average fares at the airport have generally declined over the period. Average one-way fares peaked in 1993 at about $203. In 2001, average one-way fares at Pocatello Regional were about $160 on average, roughly $10 higher than the State average of $150.27. **Table 1-24** shows historic enplanement and fare data for Pocatello Regional.

Annual Departures and Destinations Served. Nonstop service offered at Pocatello Regional Airport declined between 1992 and 2002. In 1992, carriers offered 12 daily nonstop departures on average, and by 2002, eight daily departures were available from Pocatello. In 1992, the airport had nonstop service to five destinations, including Salt Lake City and Boise. (See **Table 1-25**.) By 1997, many of the one-stop and triangle flights had been discontinued. Flights to Boise were nearly cut in half. The average number of seats per flight jumped from 23 in 1992 to 41 in 2002, due to the introduction of larger aircraft.

Table 1-24

Enplaned Passengers and
Average Non-Stop Fares, 1992-2002

Pocatello Regional Airport

Year	Enplanements	Average Fare
1992	35,165	195.16
1993	34,458	203.21
1994	38,294	196.28
1995	40,291	178.86
1996	40,800	182.41
1997	40,787	173.17
1998	40,905	183.44
1999	46,644	165.10
2000	49,163	173.01
2001	45,152	160.38
2002	46,877	159.10
Annual Growth Rate	**2.65%**	**-1.84%**

Sources: *Official Airline Guide*; Airport Records, US DOT

Table 1-25

Annual Nonstop Scheduled Departures and Average Seats per Flight

Pocatello Regional Airport

	Annual Departures			Average Seats Per Flight		
Destination	1992	1997	2002	1992	1997	2002
Salt Lake City	1,975	2,126	1,808	25	30	30
Idaho Falls	833	651	769	27	37	61
Boise	1,325	764	600	19	37	48
Twin Falls	316	0	0	19	0	0
W. Yellowstone	102	0	0	30	0	0
Other	0	0	6	0	0	180
Pocatello Total	*4,551*	*3,541*	*3,183*	*23*	*33*	*41*

Source: *Official Airline Guide*

Carriers and Equipment Types. As shown in **Table 1-26**, two carriers have provided most of the scheduled service offered at Pocatello Regional Airport. SkyWest, operating as Delta Connection, has provided nonstop service at the airport mainly with 30-seat Brasilia aircraft. Horizon, an Alaska partner, also provided nonstop service at Pocatello Regional between 1992 and 2002. In 2002, the carrier used a combination of Dash 8 and Dash 8-400 aircraft to serve Pocatello Regional. Sun Country provided scheduled charter service just six times during 2002 on jet aircraft.

Table 1-26

Carriers Providing Non-Stop Service and Equipment Type

Pocatello Regional Airport

Carrier	Code	Equipment Types		
		1992	1997	2002
Skywest (Delta Connection)	DL*	Brasilia/ Swearingen Metro	Brasilia	Brasilia
Horizon	QX	Dash 8/ Swearingen Metro	Dash 8	Dash 8-400/ Dash 8
Sun Country	SY	-	-	B737-800
Number of Carriers		*2*	*2*	*3*
Source: *Official Airline Guide*				

Summary.   **Table 1-27** summarizes the historic level of service, enplanements, and fares at Pocatello Regional Airport over the last 10 years.   As shown, fares have decreased and correspondingly, enplanements have increased. The number of weekly departures from Pocatello Regional declined between 1992 and 2002, but the number of departing seats increased during the same period as carriers shifted to larger aircraft.

Table 1-27

Passenger Service Trends Summary, 1992-2002

Pocatello Regional Airport

	1992	1997	2002	Change 1992-2002
Enplanements	35,167	40,787	46,877	33.30%
One-Way Average Fare	195.16	173.17	159.10	-18.48%
Average Weekly Departures	87	68	61	-29.89%
Average Weekly Departing Seats	2,030	2,233	2,524	25.81%
Average Seats per Flight	23	33	41	18
Number of Carriers Serving Airport	2	2	3	1
Number of Destinations Served Nonstop	5	3	4	-1
Sources: *Official Airline Guide*; Airport Records, U.S. DOT.				

Pullman-Moscow Regional Airport

Enplanements and Average One-way Fares. The level of enplaned passengers at Pullman-Moscow Regional decreased about one third of one percent each year over the ten years ending 2002. Enplanements peaked in 1996 at about 37,700, and have slowly followed a declining trend since. Pullman-Moscow Regional passengers have historically enjoyed some of the lowest fares among Idaho airports. Fares at Pullman-Moscow Regional have been below the Idaho State average for each of the last ten years, and in 1992 and 1993, the fares were lowest of the seven in-state and three out-of-state airports covered in this report. Pullman-Moscow Regional airport saw its fares decline about 10 percent between 1990 and 1995, while at the same time Lewiston/Nez Perce

County's fares declined by almost the same amount and Spokane's decreased 36 percent. Pullman-Moscow Regional's fares seem quite dependent on changes at nearby competing airports. **Table 1-28** below details the recent history of Pullman-Moscow Regional's enplanements and average one-way fares.

Table 1-28
Enplaned Passengers and
Average Non-Stop Fares, 1992-2002
Pullman-Moscow Regional Airport

Year	Enplanements	Average Fare
1992	32,915	130.80
1993	32,246	131.93
1994	37,100	126.76
1995	36,622	125.01
1996	37,687	125.67
1997	34,283	128.32
1998	28,524	131.86
1999	34,858	122.24
2000	33,196	128.89
2001	28,128	136.69
2002*	27,173	125.74
Annual Growth Rate	*-1.73%*	*-0.36%*

*Unofficial enplanements total

Sources: *Official Airline Guide*; Airport Records, US DOT

Annual Departures and Destinations Served. As shown in **Table 1-29**, the level on nonstop service offered at Pullman-Moscow Regional Airport has declined over the last 10 years. In 1992, Horizon Airlines offered an average of 17 daily flights, compared to just four daily flights in 2002. The airport had nonstop service to six destinations in 1992, including major airports at Seattle, Portland, and Spokane. Historically, Pullman-Moscow Regional has been part of a triangle routing with Lewiston and Seattle. By 2002, this routing was cut back to just once a day. The average number of seats per flight at the airport more than doubled between 1992 (26) and 2002 (56).

Carriers and Equipment Types. Horizon Airlines, code-share partner with Alaska Airlines, has been the sole carrier at Pullman-Moscow Regional over the last 10 years. As shown in **Table 1-30**, in 1992 and 1997, the carrier served the airport with a combination of Metro and Dash 8 aircraft. By 2002, Horizon offered Pullman-Moscow area passengers nonstop service using a combination of 37-seat Dash 8 and 66-seat Dash 8-400 aircraft.

Table 1-29

Annual Nonstop Scheduled Departures and Average Seats per Flight

Pullman-Moscow Regional Airport

	Annual Departures			Average Seats Per Flight		
Destination	1992	1997	2002	1992	1997	2002
Seattle	1,121	1,365	1,091	32	37	53
Lewiston	3,370	1,305	359	26	35	66
Portland	524	247	0	19	29	0
Boise	20	62	0	19	27	0
Spokane	805	0	0	25	0	0
Richland/Pasco/Kennewick	366	0	0	19	0	0
Pullman Total	*6,206*	*2,979*	*1,450*	*26*	*35*	*56*

Source: *Official Airline Guide*

Table 1-30

Carriers Providing Non-Stop Service and Equipment Type

Pullman-Moscow Regional Airport

		Equipment Types		
Carrier	Code	1992	1997	2002
Horizon	QX	Dash 8/ Swearingen Metro	Dash 8/ Swearingen Metro	Dash 8-400/ Dash 8
Number of Carriers		*1*	*1*	*1*

Source: *Official Airline Guide*

Summary. **Table 1-31** summarizes historic passenger and service trends at Pullman-Moscow Regional Airport. Enplanements decreased about 17.5 percent between 1992 and 2002, and fares have decreased about four percent during the same period. Departures and departing seats declined over the same period.

Table 1-31

Passenger Service Trends Summary, 1992-2002

Pullman-Moscow Regional Airport

	1992	1997	2002	Change 1992-2002
Enplanements	32,915	34,283	27,173	-17.44%
One-Way Average Fare	130.80	128.32	125.74	-3.87%
Average Weekly Departures	119	57	27	-77.31%
Average Weekly Departing Seats	3,120	2,024	1,575	-49.52%
Average Seats per Flight	26	36	56	30
Number of Carriers Serving Airport	1	1	1	0
Number of Destinations Served Nonstop	6	4	2	-4

Sources: *Official Airline Guide*; Airport Records, U.S. DOT.

Friedman Memorial Airport (Sun Valley)

Enplanements and Average Non-stop Fares. The Sun Valley market area saw moderate growth in enplanements between 1992 and 2001. The airport began the period serving about 50,500 originating passengers in 1992 before peaking in 1999 with over 68,300 enplanements. Since then, the airport's enplanements have fallen to about 64,500. Overall, however, the airport saw average annual increases in enplanements of about 2.25 percent, making it the fourth-fastest growing airport in Idaho. The airport also saw a slight decrease in average one-way fares over the period, but most of the decline in fares came in 2002. From a low of $165 per ticket in 1992, the average one-way fare increased consistently to a high in 2001 of over $187, before falling to a ten-year low of about $159 in 2002. **Table 1-32** details this airport's enplanement and fare histories.

Annual Departures and Destinations Served. As shown in **Table 1-33**, the level of nonstop service offered at Friedman Memorial Airport declined slightly between 1992 and 1997. Nonstop service between Friedman Memorial and Boise was cut in half over the five-year period. By 2002, this service to Boise was discontinued. However, nonstop service to Salt Lake City and Seattle grew between 1997 and 2002, and in December 2002, Horizon Airlines began additional daily nonstop service to Los Angeles and reinstated service to Boise. This new service was made possible in part by a grant the community received from the U.S. Department of Transportation's Small Community Air Service Pilot Program. The average number of seats per flight grew slightly between 1992 and 2002, from about 26 seats to 35 as larger aircraft were introduced.

Table 1-32
Enplaned Passengers and
Average Non-Stop Fares, 1992-2002
Friedman Memorial (Sun Valley)

Year	Enplanements	Average Fare
1992	50,496	164.59
1993	55,200	172.15
1994	63,004	170.07
1995	64,731	166.50
1996	63,071	170.13
1997	60,939	176.43
1998	61,430	172.35
1999	68,303	178.29
2000	62,857	183.58
2001	59,073	187.44
2002	64,515	158.75
Annual Growth Rate	*2.25%*	*-0.33%*

Sources: *Official Airline Guide*; Airport Records, US DOT

Table 1-33

Annual Nonstop Scheduled Departures and Average Seats per Flight

Friedman Memorial (Sun Valley)

Destination	Annual Departures			Average Seats Per Flight		
	1992	1997	2002	1992	1997	2002
Salt Lake City	3,212	2,889	3,556	26	30	30
Seattle	62	226	526	37	37	66
Boise	1,907	900	17	27	37	37
Los Angeles	0	0	17	0	0	66
Portland	0	26	0	0	37	0
Sun Valley Total	*5,181*	*4,041*	*4,116*	*26*	*32*	*35*

Source: *Official Airline Guide*

Carriers and Equipment Types. Two carriers have provided scheduled service at Friedman Memorial Airport over the last 10 years (see **Table 1-34**). A Delta Connection partner, SkyWest, has provided nonstop service to Delta's hub in Salt Lake City mainly on 30-seat Brasilia aircraft. Horizon Airlines historically provided nonstop service to Boise using a combination of Dash 8 and Metro aircraft. In 2002, Horizon served the Sun Valley-Seattle and Sun Valley-Los Angeles routes with 66-seat Dash 8-400 aircraft and served Boise with 37-seat Dash 8 aircraft.

Table 1-34

Carriers Providing Non-Stop Service and Equipment Type

Friedman Memorial (Sun Valley)

Carrier	Code	Equipment Types		
		1992	1997	2002
Horizon	QX	Dash 8/ Swearingen Metro	Dash 8	Dash 8-400/ Dash 8
SkyWest (Delta Connection)	DL*	Brasilia/ Swearingen Metro	Brasilia	Brasilia
Number of Carriers		*2*	*2*	*3*

Source: *Official Airline Guide*

Summary. **Table 1-35** presents a summary of passenger and service at Friedman Memorial Airport. Despite significant increases in fares before 2002, enplanements at the airport increased by over 26 percent between 1992 and 2002. As shown, weekly departure levels declined about 21 percent in this period. However, by 2002, the declining service trend had been reversed. Average weekly departing seats increased by about 270 per week, due to the airlines' shift to larger aircraft. Additionally, Horizon and Skywest have both added new service at the airport in the last few years.

Table 1-35
Passenger Service Trends Summary, 1992-2002
Friedman Memorial (Sun Valley)

	1992	1997	2002	Change 1992-2002
Enplanements	50,856	60,939	64,515	26.86%
One-Way Average Fare	164.59	176.43	158.75	-3.55%
Average Weekly Departures	100	78	79	-21.00%
Average Weekly Departing Seats	2,617	2,486	2,753	5.20%
Average Seats per Flight	26	32	35	9
Number of Carriers Serving Airport	2	2	2	0
Number of Destinations Served Nonstop	4	4	4	0
Sources: *Official Airline Guide*; Airport Records, U.S. DOT.				

Joslin Field/Magic Valley Regional Airport (Twin Falls)

Enplanements and Average One-way Fares. Joslin Field/Magic Valley Regional Airport, like other small airports in the State, saw decreases in its level of enplanements over the late 1990s, after peaking in the early to middle part of the decade. Overall, the airport experienced average annual decreases in enplanements of slightly more than one percent. After beginning the period at slightly more than 36,000 enplanements, the airport's traffic peaked in 1994 and again in 1996, before falling in 1997. Horizon Airlines pulled out of the Twin Falls market in 1997, leaving SkyWest as the only carrier in the market. Afterward, enplanements recovered slightly between 1997 and 2001, but in 2002 the airport served a lower number of passengers. Historic fares reflect the service history at the airport, which saw generally decreasing fares between 1992 and 1997, after which an increase occurred when SkyWest found itself with a monopoly in the Twin Falls market. Airline travelers in the Twin Falls market saw fares fall in 2001 and 2002 to their lowest levels in ten years. **Table 1-36** below details Joslin Field/Magic Valley Regional Airport's enplanement and fare history.

Table 1-36

Enplaned Passengers and

Average Non-Stop Fares, 1992-2002

Joslin Field/Magic Valley Regional (Twin Falls)

Year	Enplanements	Average Fare
1992	36,051	169.71
1993	37,788	171.08
1994	43,610	173.78
1995	41,779	154.79
1996	43,393	161.26
1997	31,862	163.32
1998	31,593	178.28
1999	34,010	175.48
2000	34,409	173.47
2001	32,833	157.90
2002	31,794	152.56
Annual Growth Rate	*-1.14%*	*-0.96%*

Sources: *Official Airline Guide*; Airport Records, US DOT

Annual Departures and Destinations Served. As shown in **Table 1-37**, the level of nonstop service offered at Joslin Field/Magic Valley Regional Airport declined by about 50 percent the last 10 years. Departures from the airport dropped from ten per day in 1992 to five per day in 2002. In 1992, the airport had nonstop service to Salt Lake City and Boise, as well as one-stop service to Boise via Pocatello. In 1997, all service to Boise was discontinued and the airport had nonstop service to only Salt Lake City. The average number of seats per flight remained relatively unchanged over the ten-year period, rising slightly to the current level of 30 seats per flight.

Carriers and Equipment Types. Over the last ten years, Joslin Field/Magic Valley Regional Airport has had nonstop service by turboprop aircraft. (See **Table 1-38**.) In 1992 and 1997, two carriers, namely SkyWest (Delta Connection) and Horizon, offered scheduled service at the airport. However, in 1997, Horizon ceased serving the airport. SkyWest has been the only carrier offering scheduled service at the airport for the last five years, offering nonstop service on 30-seat Brasilia aircraft.

Table 1-37

Annual Nonstop Scheduled Departures and Average Seats per Flight

Joslin Field/Magic Valley Regional Airport (Twin Falls)

Destination	Annual Departures			Average Seats Per Flight		
	1992	1997	2002	1992	1997	2002
Salt Lake City	1,795	2,001	1,804	30	30	30
Boise	1,565	378	0	19	27	0
Pocatello	207	0	0	19	0	0
Twin Falls Total	*3,567*	*2,379*	*1,804*	*25*	*29*	*30*

Source: *Official Airline Guide*

Table 1-38

Carriers Providing Non-Stop Service and Equipment Type

Joslin Field/Magic Valley Regional Airport (Twin Falls)

Carrier	Code	Equipment Types		
		1992	1997	2002
SkyWest (Delta Connection)	DL*	Brasilia	Brasilia	Brasilia
Horizon	QX	Swearingen Metro	Dash 8/ Swearingen Metro	-
Number of Carriers		*2*	*2*	*1*
Source: *Official Airline Guide*				

Summary. **Table 1-39** summarizes historic enplanement and service trends at Joslin Field-Magic Valley Regional Airport. Despite decreases in fares at the airport, enplanements fell about seven percent between 1992 and 2002. The airport has also seen decreases in the service measures reported in Table 1-39, except in average seats per flight. It is worth noting that Twin Falls is the nearest commercial service airport to Boise Air Terminal, and airlines at Twin Falls experience competition from air service options offered at Boise's airport. This competition may be one of the reasons for service level declines at Joslin Field.

Table 1-39

Passenger Service Trends Summary, 1992-2002

Joslin Field/Magic Valley Regional Airport (Twin Falls)

	1992	1997	2002	Change 1992-2002
Enplanements	36,051	31,862	31,794	-11.81%
One-Way Average Fare	169.71	163.32	152.56	-10.11%
Average Weekly Departures	69	46	35	-49.28%
Average Weekly Departing Seats	1,683	1,348	1,040	-38.21%
Average Seats per Flight	25	29	30	5
Number of Carriers Serving Airport	2	2	1	-1
Number of Destinations Served Nonstop	3	2	1	-2
Sources: *Official Airline Guide*; Airport Records, U.S. DOT.				

Statewide Enplanement Summary

Table 1-40 shows the history of Idaho's commercial enplanements from 1992 to 2002. Enplanements at the State's airports increased by 690,000 passengers during this period, or about five percent per year on average. Boise Air Terminal was responsible for the largest part of the growth in the State's passenger enplanements, with an increase of over 740,000 passengers, or an average growth rate of about seven percent per year. Most of the rest of the growth could be found at Lewiston, Pocatello, and Sun Valley. As discussed above, airports serving Idaho Falls, Pullman, and Twin Falls experienced small average annual decreases in enplanements over the same period.

Table 1-40
Idaho and U.S. Commercial Airline Enplanements, 1992-2002

	Airport							Idaho	United States
Year	Boise	Idaho Falls	Lewiston	Pocatello	Pullman	Sun Valley	Twin Falls	Total	Total
1992	650,846	124,683	39,556	35,165	32,915	50,496	36,051	969,712	309,013,530
1993	794,032	125,103	41,969	34,458	32,246	55,200	37,788	1,120,796	321,385,460
1994	959,540	117,165	47,031	38,294	37,100	63,004	43,610	1,305,744	345,107,440
1995	1,107,519	114,734	48,052	40,291	36,622	64,731	41,779	1,453,728	361,589,460
1996	1,262,080	114,886	56,688	40,800	37,687	63,071	43,393	1,618,605	382,932,100
1997	1,261,322	113,763	59,642	40,787	34,283	60,939	31,862	1,602,598	394,540,870
1998	1,297,457	118,893	56,565	40,905	28,524	61,430	31,593	1,635,367	399,398,770
1999	1,421,851	115,754	64,975	46,644	34,858	68,303	34,010	1,786,395	415,887,270
2000	1,510,157	123,791	66,964	49,163	33,196	62,857	34,409	1,880,537	432,334,840
2001	1,426,187	118,033	61,024	45,152	28,128	59,073	32,833	1,770,430	402,918,210
2002	1,393,158	114,143	61,138	46,877	27,173	64,515	31,794	1,738,798	n/a
AAGR	7.16%	-0.80%	4.04%	2.65%	-1.73%	2.25%	-1.14%	5.45%	2.69%

Sources: *Official Airline Guide*; Airport Records, US DOT

Statewide Average One-way Fare Summary

The average one-way fare for each of Idaho's airports for 1992-2001 is presented in Table 1-41. In addition, fares at nearby competing airports are shown as well. Fares at Boise Air Terminal have shown the largest decrease, with an average annual decrease of about three-and-a-half percent. Only Salt Lake City and Spokane air service consumers have seen similar decreases in fares. Before 2002, two of Idaho's airports had experienced increases in average fares; Pullman-Moscow Regional and Friedman Memorial each saw fractional increases each year on average before falling in 2002.   Fares at Boise Air Terminal are the least expensive among Idaho's airports, with Lewiston/Nez Perce County and Pullman-Moscow Regional in second and third.   The most expensive fares in the State are in the Idaho Falls market, while Spokane fares are least expensive of all those in the study area. Travelers at Spokane paid about $23 less on average than at Lewiston/Nez Perce County and $15 less than Pullman-Moscow Regional. This helps to explain the phenomenon reported by travel agents that passengers drive to Spokane from these areas. Similarly, average one-way fares at Boise Air Terminal are about $35 to $50 less than those at Idaho Falls Regional, Pocatello Regional, or Twin Falls, and fares at Salt Lake City are at least $20

than any of those. This may help to explain some of the passenger leakage that occurs from the market areas that these airports serve.

Table 1-41
Average One-Way Fare 1991-2002

Airport	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	AAGR
Boise Air Terminal	173.68	145.32	134.77	118.24	110.54	113.76	116.50	120.64	125.34	118.48	117.45	-3.49%
Idaho Falls Regional	180.35	181.85	195.75	171.71	170.99	175.95	176.01	179.28	175.59	160.85	169.99	-0.54%
Lewiston/Nez Perce Co.	141.74	136.68	133.57	133.34	139.71	146.68	143.13	125.83	127.40	130.14	134.23	-0.49%
Pocatello Regional	195.16	203.21	196.28	178.86	182.41	173.17	183.44	165.10	173.01	160.38	159.10	-1.84%
Pullman/Moscow Reg.	130.80	131.93	126.76	125.01	125.67	128.32	131.86	122.24	128.89	136.69	125.74	-0.36%
Friedman Memorial	164.59	172.15	170.07	166.50	170.13	176.43	172.35	178.29	183.58	187.44	158.75	-0.33%
Joslin Field/Magic Valley	169.71	171.08	173.78	154.79	161.26	163.32	178.28	175.48	173.47	157.90	152.56	-0.96%
Missoula International	159.77	170.49	179.31	174.27	184.49	174.23	178.20	173.86	190.99	167.40	169.03	0.51%
Salt Lake City Int'l	167.39	126.58	116.13	108.18	106.98	116.44	125.36	129.69	137.63	130.01	132.97	-2.07%
Spokane International	150.06	123.80	111.77	103.84	102.61	104.48	106.32	106.60	114.25	110.43	111.14	-2.69%
Idaho Average	*165.15*	*163.17*	*161.57*	*149.78*	*151.53*	*153.95*	*157.37*	*152.41*	*155.33*	*150.27*	*145.40*	*-1.15%*
Out-of-State Average	*159.07*	*140.29*	*135.74*	*128.76*	*131.36*	*131.72*	*136.63*	*136.72*	*147.62*	*155.57*	*137.71*	*-1.30%*
Study Airports Average	*163.33*	*156.31*	*153.82*	*143.47*	*145.48*	*147.28*	*151.15*	*147.70*	*153.02*	*145.97*	*143.10*	*-1.19%*
US Airports Average	*141.13*	*147.75*	*135.85*	*138.69*	*142.24*	*144.08*	*147.04*	*148.72*	*157.93*	*146.85*	*141.82*	*0.04%*

Source: USDOT, O&D Survey. AAGR: Average Annual Growth Rate

Chapter Conclusions

The information presented in this chapter was designed to provide a comprehensive status report on the current commercial air service system in Idaho. Efforts were undertaken to assess a variety of aspects of the system. Travel agents provided data that included the travel patterns of their clients and the airports those travelers use in Idaho. Commercial airline passengers were surveyed to determine similar data, along with method of ticket purchase information. Parking lot inventories allowed researchers to determine the general market area for each airport. Additionally, a variety of socioeconomic and demographic data was compiled in Chapter 1 that pertain to the propensity of Idaho's residents and visitors to use airline service. Population, employment, income, and tourism data are all useful in determining demand for commercial airline service.

The last section of Chapter 1 included an in-depth discussion of historic air service at each Idaho airport. Data was compiled that included enplanements, average one-way fares, departures and departing seats, carriers, and destinations. The levels and changes in these measures are a useful indication of how demand for air service has changed as service and fares have changed.

Following chapters of this document will build upon the findings in this chapter. From these data, an assessment of current demand each airport's market area can be made. This data will support an estimation of enplanement levels in each county, the distribution of those passengers to Idaho's airports, and passenger diversion to nearby competing airports. Discussion of this research is provided in the following chapters.